



# CUSTOMER SUPPORT PORTAL USER GUIDE

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Pre-requisites

New User Creation Process



1-866-837-2465

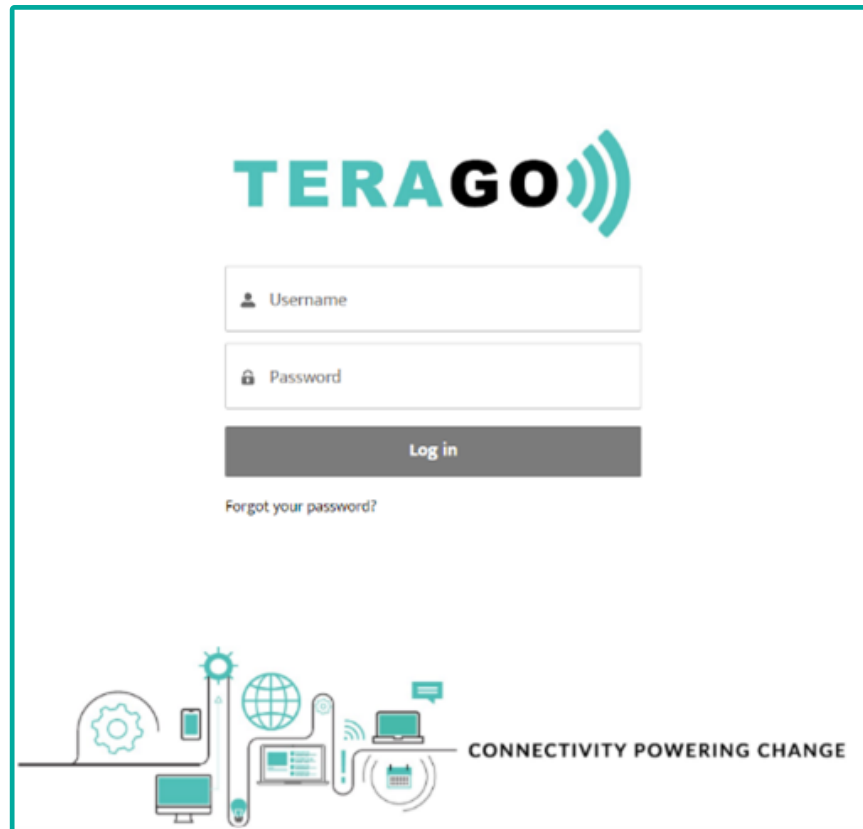


/company/TERAGO



@TERAGO\_Networks

## 1. Navigate to “TERAGOSupport.ca” customer portal link



**Username:** User email address (same email address receiving this information).

**Password:** Technical contacts will receive an email to reset their passwords.

**\*Note :** Prime technical contacts will have admin permissions to the portal.

- **Group Admin User:**

- have admin permissions to view all cases created under the account(s) they are admins on.
- can view and submit cases for all service locations associated with the account(s), along with getting notifications for those tickets.

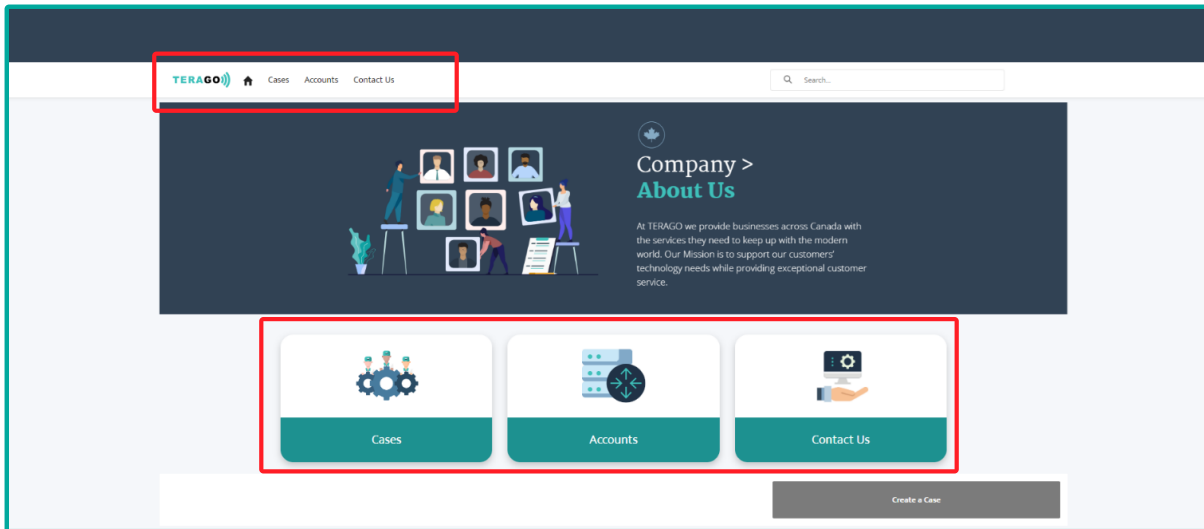
- **Standard User(s):**

- have limited permissions on the service locations they are associated with and can not view and get notified for cases submitted for other service locations.

***Type of access can be granted/modified by Group Admin Users to all users on the account.***

***(This will be illustrated in sub-sequent sections of the guide)***

# Login to the New TERAGO Customer Support Portal for the first time



At the top of the page, you will see three tabs similar to the tabs in the body of the page:

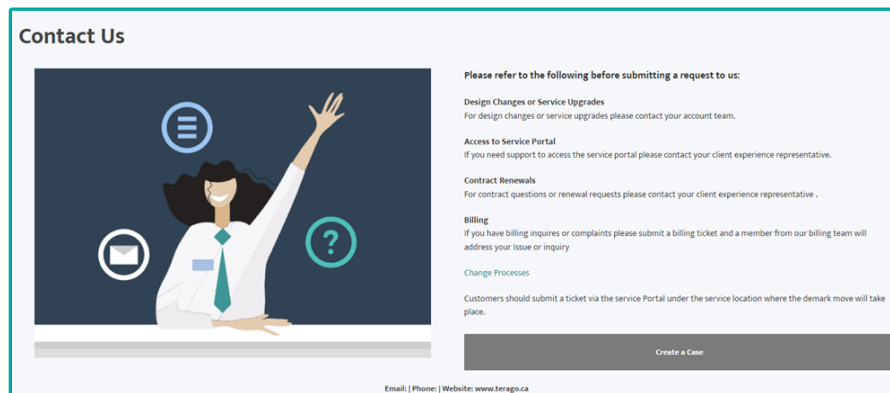
- 1. Cases (Tickets) :** All open and closed cases related to service locations under your account will be found here.
  - Admins will view all cases opened by each user on the account.
  - Standard users will only view cases associated with service locations they have access to.

Case Number	Status	Pri.	Type	Co.	Account Name	Service Location Address	Date/Time
1							08/02/2023
2							10/02/2023
3							14/02/2023

- 2. Accounts:** All service locations that the user have access to can be viewed here.

Account Name	Acc.	Phone	Email	Billing Street	Billin.	Billi.	Billi.	Billi.	Billi.
1									
2									

- 3. Contact Us:** Contains useful links, FAQ for process & how to get support from the TERAGO Team.

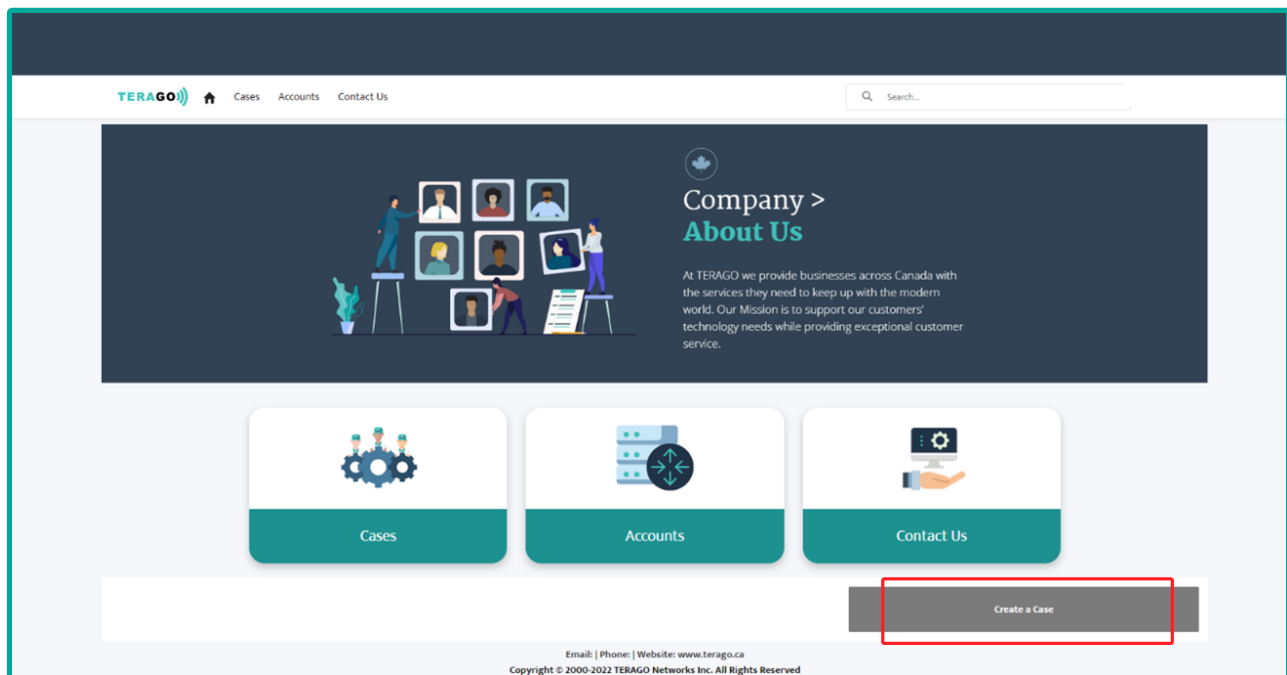


# Creating a Case

Users can create tickets, or submit an account inquiry. The drop down list on the case type helps you choose the nature of your request.

The screenshot shows the 'New Case' form in the TERAGO portal. The form includes fields for 'Contact Name', 'Account Name' (with a search dropdown), 'Service Location' (with a search dropdown), and 'Billing Account' (with a search dropdown). A dropdown menu for 'Type' is open, showing options: '--None--', 'Account Change', 'Billing Inquiry', 'Degraded Usable', 'Technical Support', 'General Inquiry', and 'Degraded Nonusable'. A 'Confirm' button is at the bottom. The footer contains contact information and copyright details.

1. Users can use the quick link **"Create a Case"** at the main page as shown below.



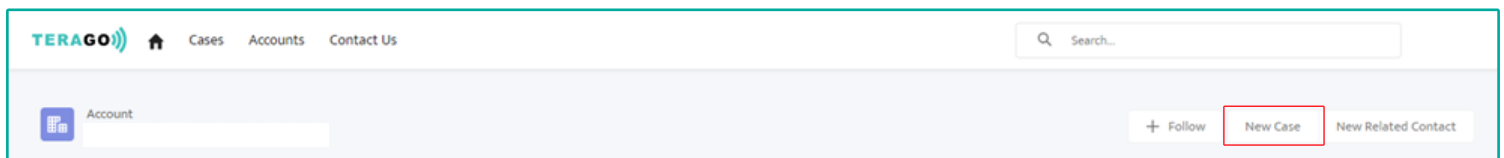
A new window will open; users are encouraged to add as much information as possible in the **"Description"** box below to describe the issue or request.

# Creating a Case

The 'New Case' form is a web-based interface for creating a new support case. It features several input fields and a 'Confirm' button at the bottom. The fields are organized into two columns. The left column includes 'Contact Name', 'Type' (a dropdown menu with '--None--' selected), 'Type Other' (a text input), 'Subject' (a text input), and 'Description' (a larger text area). The right column includes 'Account Name' (a search input with 'Search Accounts...' placeholder), 'Service Location' (a search input with 'Search Accounts...' placeholder), and 'Billing Account' (a search input with 'Search Accounts...' placeholder). Each search input has a magnifying glass icon on the right. A dark grey 'Confirm' button is centered at the bottom of the form.

- If a user is assigned to more than one account, please choose the account and service location for which a case is to be opened.
- For accounts with multiple service locations, please select the site you intend to submit a case for.
- Under the **“Type”** section, please select the type that best describes your issue. In the case of a billing ticket or inquiry please select **“Billing Inquiry”** so the case is forwarded directly to the billing team.

2. Alternatively, users can navigate to the accounts tab, select the account and click on **“New case”** as shown below and follow the same steps in 1 above.



- Users will get notifications when changes take place on cases they opened or have access to.
- Once a case is closed, the originator will receive a survey; kindly take some time to rate your experience with the support you got from TERAGO Team.

# Create and Modify Users

## Pre-requisites

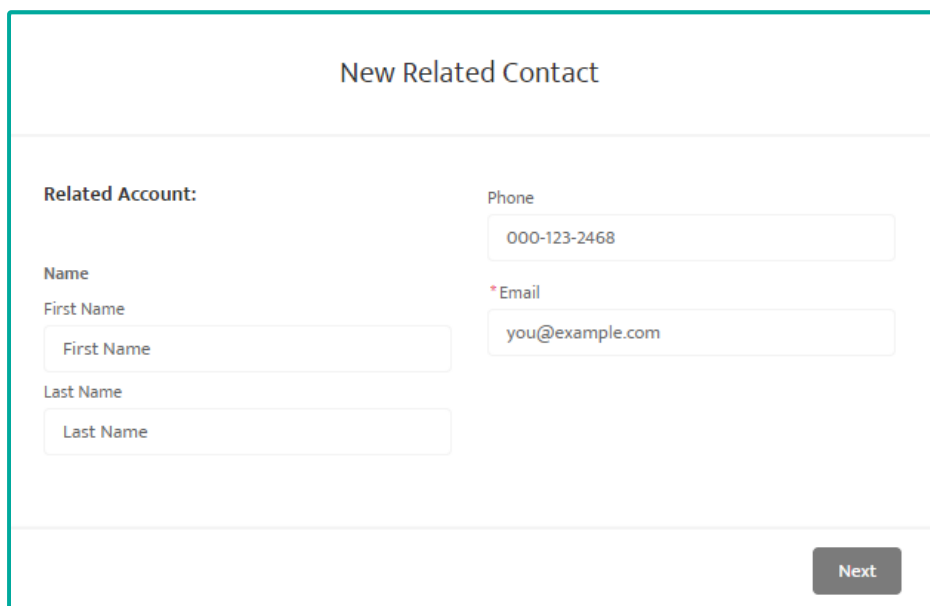
- Requires an active User account.
- Requires 'Admin user" permission.

## NEW USER CREATION PROCESS

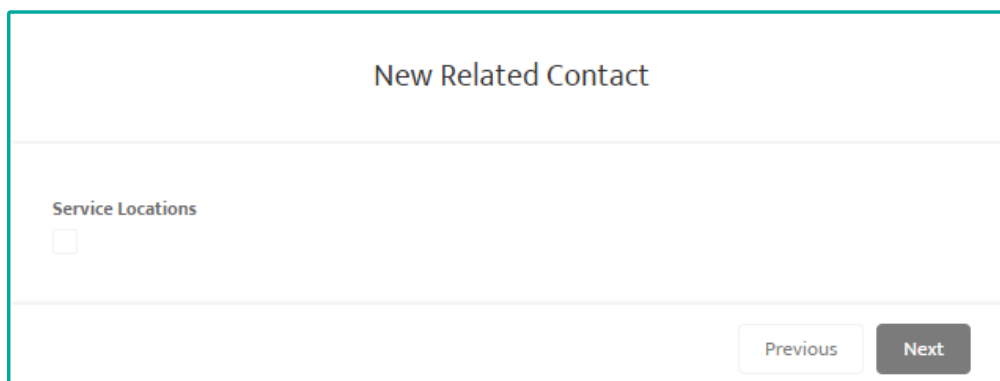
1. Navigate to the "Accounts" tab.
2. Select the account you want to add users to.
3. Click on "New Related Contact" at the top of the page.

A screenshot of the TERA GO web application interface. The top navigation bar includes the TERA GO logo, a home icon, and links for 'Cases', 'Accounts', and 'Contact Us'. A search bar is on the right. Below the navigation bar, there's a section for 'Account' with a dropdown menu. To the right of this section are three buttons: '+ Follow', 'New Case', and 'New Related Contact'.

4. A new window will pop up, please add user details and click on Next.

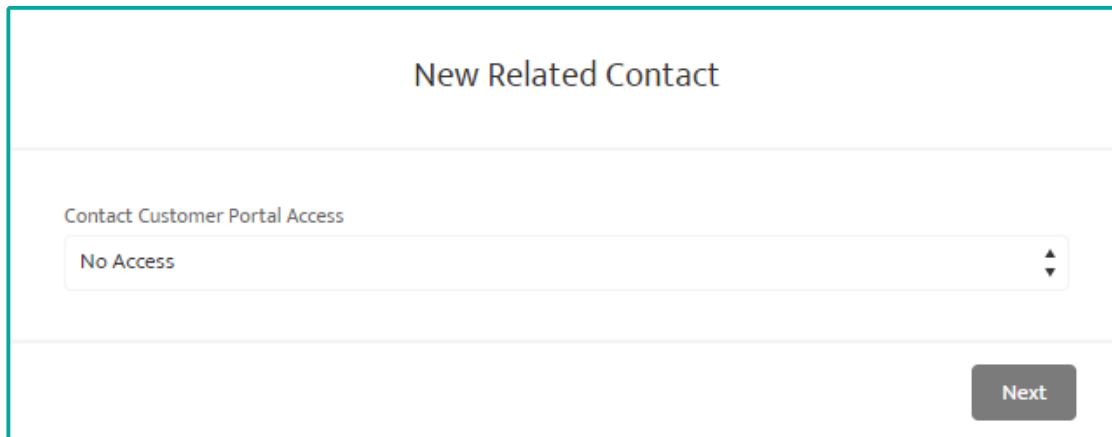
A screenshot of a 'New Related Contact' form. The form has a title 'New Related Contact' at the top. Below the title, there are two columns of input fields. The left column is labeled 'Related Account:' and contains fields for 'Name' (with sub-fields 'First Name' and 'Last Name'). The right column contains fields for 'Phone' (with the value '000-123-2468') and '\* Email' (with the value 'you@example.com'). At the bottom right of the form is a 'Next' button.

5. If your account has multiple locations, please select which service locations this new user should have access to on the following screen and click Next.

A screenshot of a 'New Related Contact' form, similar to the previous one but with a different section highlighted. The title 'New Related Contact' is at the top. Below the title, there is a section labeled 'Service Locations' with a single checkbox. At the bottom right of the form are two buttons: 'Previous' and 'Next'.

# Create and Modify Users

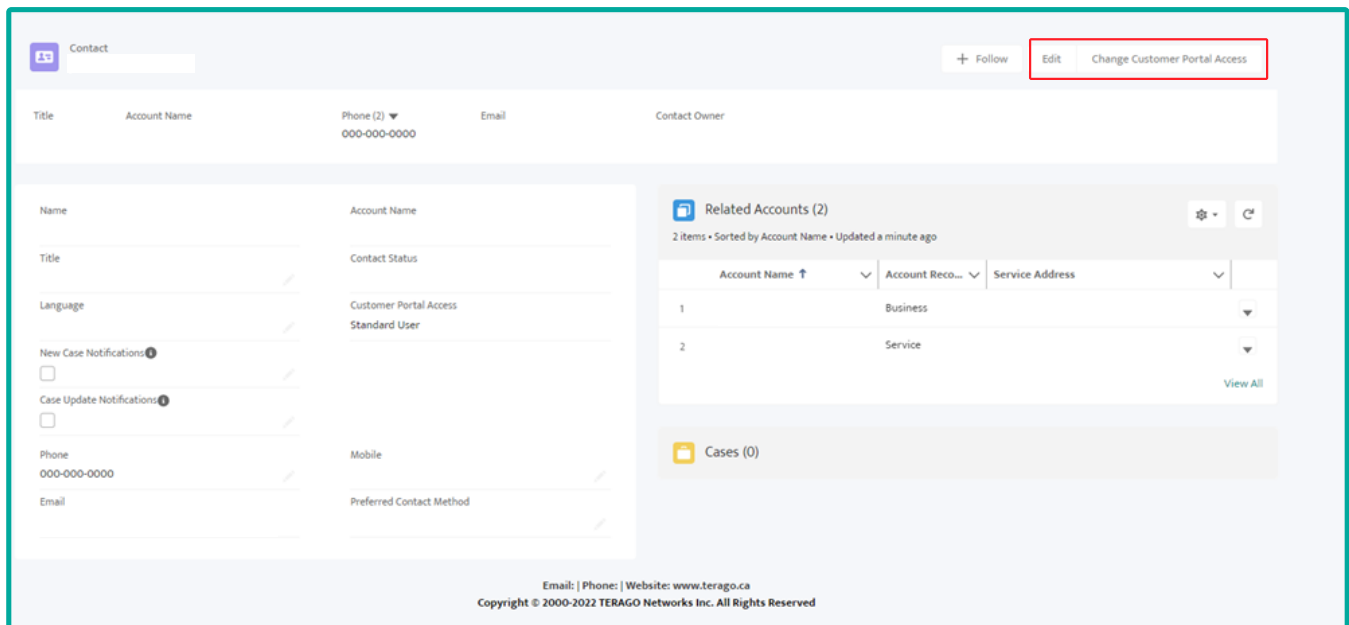
6. Select the type of access you want to grant to this new user (Group Admin User or Standard User) by clicking at the drop down list as shown below and click Next.



The screenshot shows a form titled "New Related Contact". Below the title, there is a section labeled "Contact Customer Portal Access" containing a dropdown menu currently set to "No Access". At the bottom right of the form is a "Next" button.

7. The new user will now be visible at the “Related Contacts” Section at the bottom right-hand side on the main account page.

8. Group Admin Users can view any user and edit their contact information and access type, by clicking on the user from the “Related Contacts” list.



The screenshot displays a user profile page. At the top, there are tabs for "Contact", "Follow", "Edit", and "Change Customer Portal Access". The main content area is divided into two columns. The left column contains fields for Name, Title, Language, New Case Notifications, Case Update Notifications, Phone, and Email. The right column contains fields for Account Name, Contact Status, Customer Portal Access (set to Standard User), Mobile, and Preferred Contact Method. Below these fields is a "Related Accounts (2)" section with a table listing two accounts. The table has columns for Account Name, Account Reco..., and Service Address. The first account is "Business" and the second is "Service". A "View All" link is present below the table. At the bottom, there is a "Cases (0)" section. The footer contains contact information and a copyright notice.

Account Name	Account Reco...	Service Address
1	Business	
2	Service	

9. If you wish to view/edit or remove the relationship of the user with a specific service location, click the drop down list next to the service location and select the action required.

Make sure you are selecting a specific service location.

# Create and Modify Users

Contact

+ Follow Edit Change Customer Portal Access

Title Account Name Phone (2) ▼ 000-000-0000 Email Contact Owner

Name Account Name

Title Contact Status

Language Customer Portal Access Standard User

New Case Notifications ⓘ ☐

Case Update Notifications ⓘ ☐

Phone 000-000-0000 Mobile

Email Preferred Contact Method

Related Accounts (2) 2 Items • Sorted by Account Name • Updated a minute ago

Account Name ↑	Account Reco... ▼	Service Address ▼
1	Business	▼
2	Service	▼

View All

Cases (0)

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10. Users can update their notification preference from the main contact page as shown below.

Contact

Title Account Name Phone (2) ▼ 000-000-0000 Email

Name Account Name

Title Contact Status

Language Customer Portal Access Standard User

New Case Notifications ⓘ ☐

Case Update Notifications ⓘ ☐

Phone 000-000-0000 Mobile

Email Preferred Contact Method



# CONNECTIVITY POWERING CHANGE

*Version 1.0  
March 2nd, 2023*