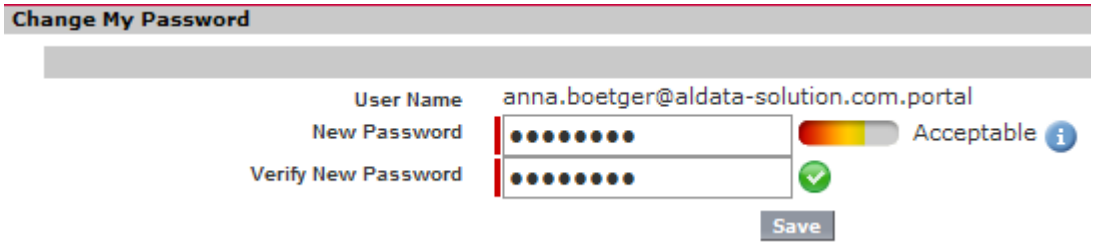
Aldata
100% Retail-Wholesale

Aldata Customer Support

Customer Portal Training Manual

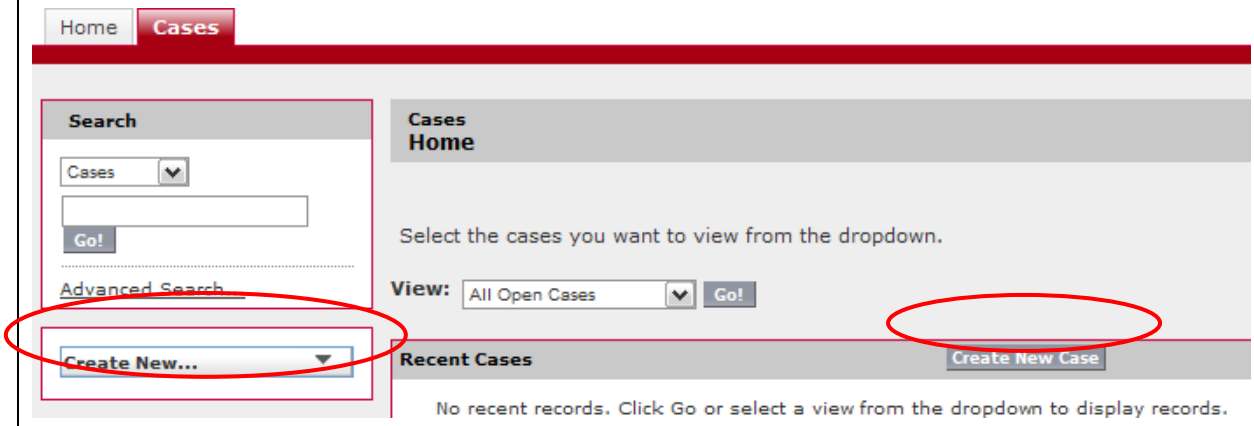
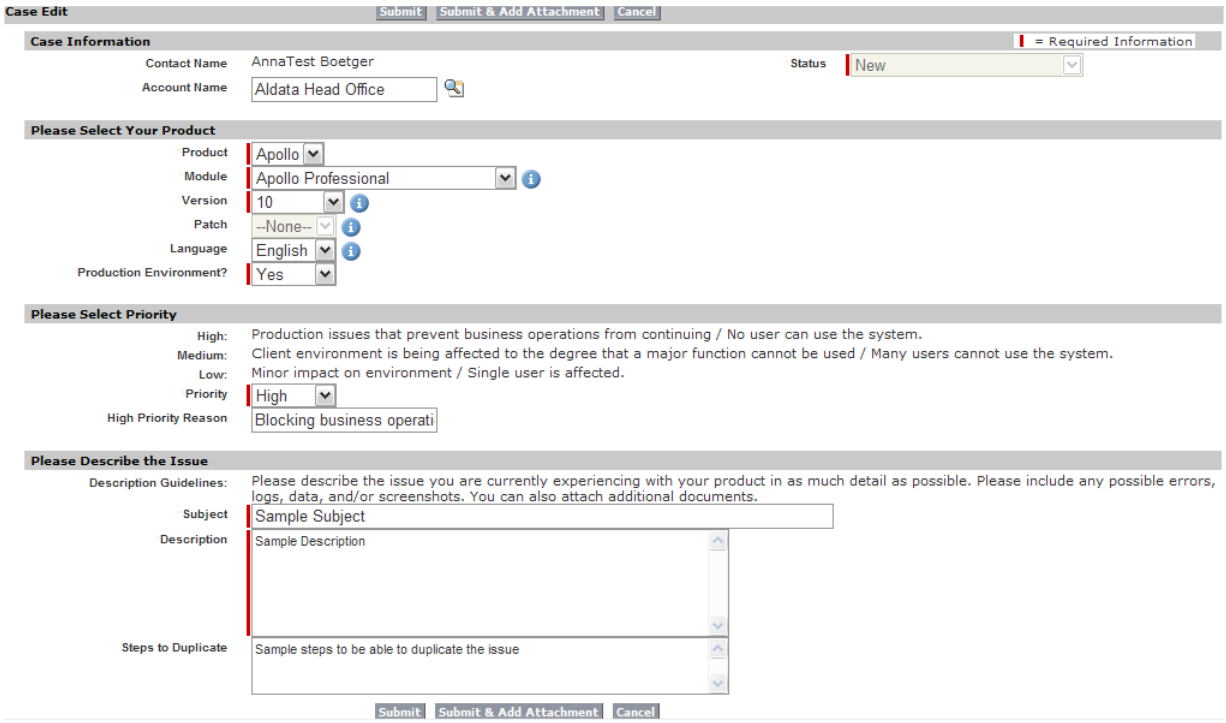
Login / Reset Password

Business Case	Login to the Aldata CRM Customer Portal
Notes	*You should receive an email from Aldata Customer Support (aldata_cutomer_support@aldata-solution.com) when your portal user is activated. It contains your user name, password, and a direct link to the portal. If you did not receive this email, please email ApolloSupportUSA@aldata-solution.com (for US customers) or ApolloSupportInt@aldata-solution.com (for international customers) with your account and contact information so that we can generate or reset your password.*
Procedure	
Address	https://emea.salesforce.com/secur/login_portal.jsp?orgId=00D200000005m6J&portalId=060200000000p9I (or the direct link provided in the email)
Login	Username: Typically your email address Password: Auto-generated password included on original email
Reset Password	The first time you login, you will be automatically redirected to change your password. Any other time, you can reset your password by clicking "My Profile" on the home screen and then "Change My Password" at the top of the page. Enter a new password, then re-enter it to verify. *Note: If the new password you entered is not accepted, you may need to add a character other than letters and numbers or make it longer.* 

Create a Case

Business Case	You have a question or issue regarding your software, so you login to the Salesforce.com customer portal, and create a new case.
Notes	

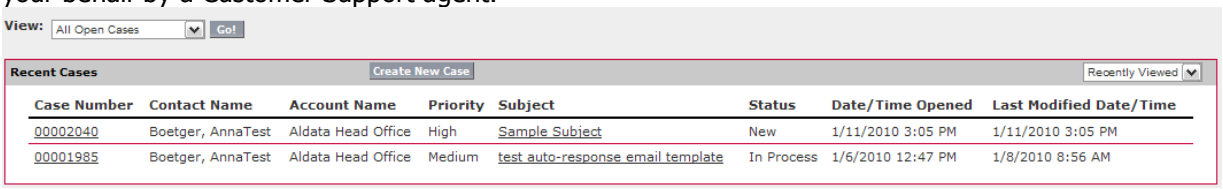
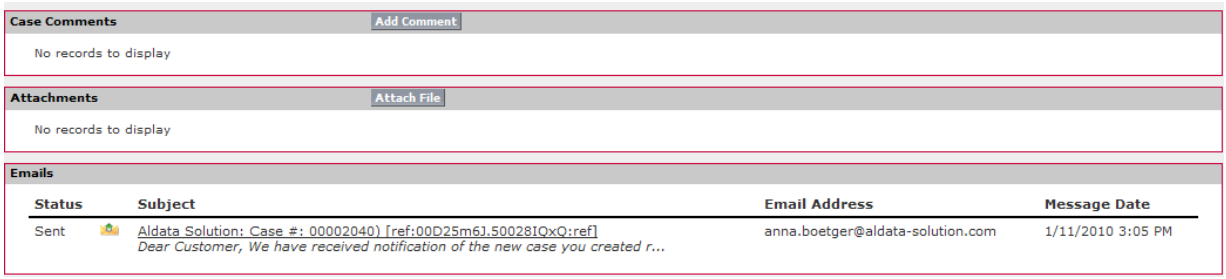
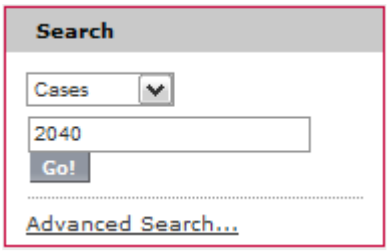
Procedure

Create new case	To create a new case, either select "Case" from the [Create New…] drop-down on the left navigation pane or on the 'Cases' tab, click the [Create New Case] button. 
Enter case information & submit	Fill in all fields, particularly the required ones. • Click the magnifying glass to search for data in the fields. • Hover over the information icon to display more information about that field.  Click [Submit] when complete or click [Submit & Add Attachment] to direct you to another page to attach a document to this case. You can also come back to the case later to add an attachment.

Follow-Up on Cases

Business Case	You need to check the status of your cases or add more information to a case.
Notes	*You cannot edit the main case fields once the case has been submitted. You can, however, add comments, add attachments, and close your cases.* *Any time an agent adds information for you to the case, you will receive an email notification.*

Procedure

Access the case	Access cases by clicking on the [Cases] tab at the top. Select the view "All Open Cases" to list the cases that you have logged or that have been logged on your behalf by a Customer Support agent.  Click on the Case Number or Subject to view the case detail page.
Add more information	On the case detail, you can add a comment by scrolling down and clicking the [Add Comment] button or attach a file by clicking the [Attach File] button. An email will notify Customer Support that the case has been modified. 
Search for a case	In the navigation panel on the left, select "Cases" from the search drop-down. In the search box, type any portion of the case number or subject, and click [Go!]. *The advanced search link allows you to search your history of cases for any parts of the full description, comments, and attachments.* 

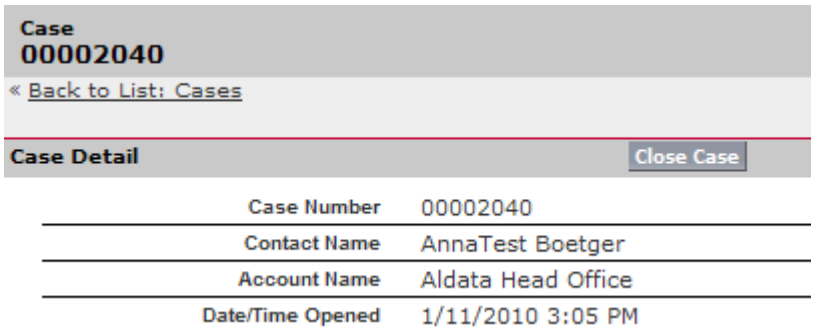
Close a Case

Business Case	You resolved the case either on your own or with help from Customer Support, so the case status should be set to "Closed."
Notes	*When the Customer Support agent has resolved the case with you, the agent may close the case, which will generate an email notification to you.*

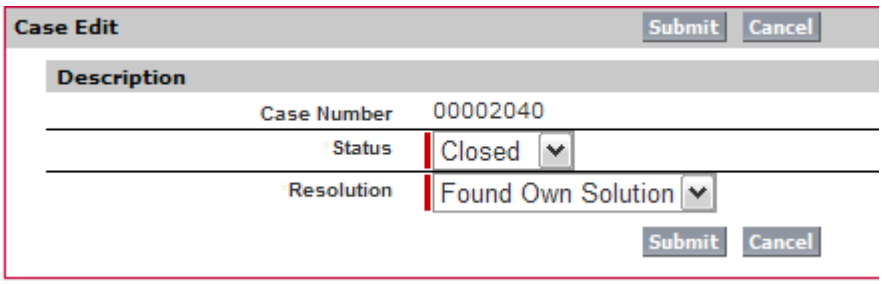
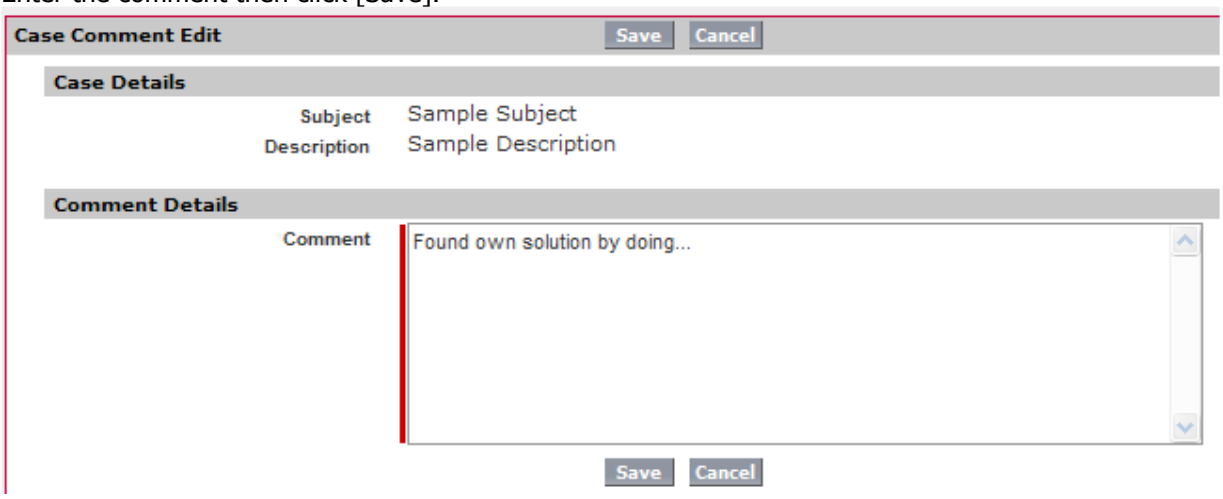
Procedure

Close the case

Once you have searched for the desired case and clicked on the case number or subject to view the case detail, click on the [Close Case] button.



Set the Status to "Closed" and select a Resolution code.
Then click [Submit].



You can add a comment by clicking [Add Comment] on the Case Details page.
Enter the comment then click [Save].