

# Ibcos Customer Ticket Portal Guide

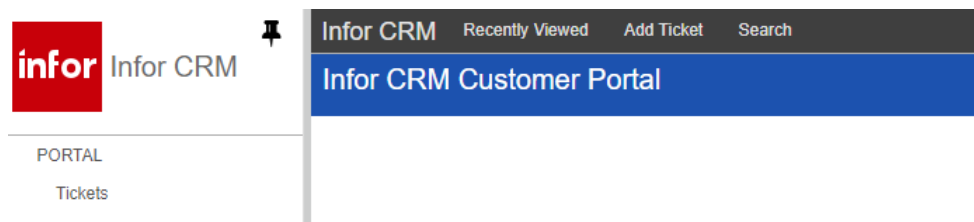
## Accessing the Ticket Portal

You can access our customer ticket portal by navigating to the address below. This will allow you to log and review tickets for your company.

<https://customer.ibcos.co.uk/support-ticket-portal/>

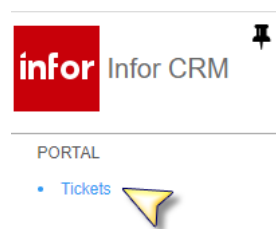
Log in with your username and password, provided by Ibcos.

You should then see an 'Infor CRM Customer Portal' screen.

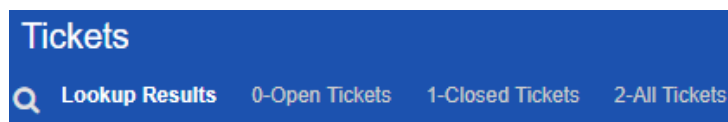


## Navigation

Use 'Tickets' on the left to display the 'ticket groups.'



Use the 'ticket groups' to find and filter your tickets.



When in a ticket, use the 'list view' button to return to the list view.



## Adding a New Ticket

Use the 'Add Ticket' option at the top of the window to open up a new ticket window. All of your details should be stored at the top of the screen. Please ensure these are correct and contact us if there are any changes to be made.

The screenshot shows the Infor CRM interface for adding a new ticket. The top navigation bar includes 'Infor CRM', 'Recently Viewed', 'Add Ticket', and 'Search'. The main content area is titled 'Add Portal Ticket' and is divided into two sections: 'Contact Information' and 'Add Portal Ticket'. The 'Contact Information' section contains the following fields: 'Contact Name' (TEST, Ibcos), 'Work Phone' (01202730522), 'Company Name' (Ibcos - Internal Testing), and 'Email' (ibcos@ibcos.co.uk). The 'Add Portal Ticket' section contains the following fields: 'Subject' and 'Description'. A 'Submit Ticket' button is located at the bottom right of the form.

### Subject:

This should be a brief description of the query or issue. Please make this as clear and concise as possible.

### Description:

Enter as much detail as possible about the query, giving specific examples, references and account numbers where applicable.

### Please also include:

- If you are on Windows or Classic Gold.
- Steps we can take to replicate a reoccurring issue.
- Whether the issue affects any other users.
- Exact options selected if running a report.
- Exact options selected if running a batch routine – i.e. Batch Invoice Print, Statement Print, Remittance Advice etc.

Once you have entered your details into the description, click 'Submit Ticket.' This will generate a ticket reference and take you into the ticket detail. You will receive an automatic email to confirm the details that are saved on our system. You now have the option to include attachments. Please attach any error messages, screenshots or reports that will help us understand your query better.

Add Portal Ticket

Subject:

Description:

Submit Ticket

## Adding an Attachment

You will need to save the file on your PC first.

Ensure the Attachments tab (1) is highlighted toward the bottom of the screen.

Click the 'Add File' button (2), as seen below. This will bring up a file browser for you to search for the file. Once located, you can double-click the file to add it.

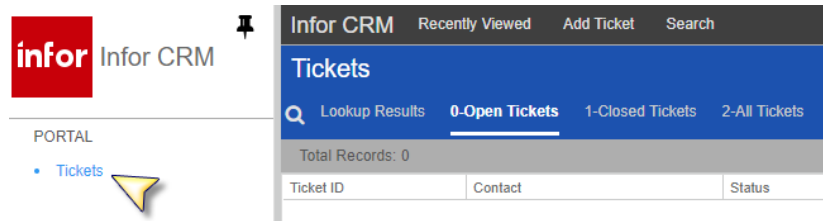
You can now click 'List View' (3) to go back to your list of tickets, or use the 'Sign Off' option (4) to log out.

The screenshot displays the Infor CRM interface for a ticket. The ticket ID is 201-00-455344. The contact information includes TEST, Ibcos, with a work phone of 01202730522 and an email address. The ticket status is 'Open', received on 1/15/2019, and the subject is 'Ibcos Customer Ticket Portal'. The description and resolution fields are empty. The interface includes a 'Close Ticket' button and a 'Comments' section with an 'Attachments' tab highlighted (1). A table below shows one attachment: 'Gold Screenshot' (0 KB, docx) uploaded by 'Access, Web' on 1/15/2019 at 10:59 AM. At the bottom right, there is a 'Sign Off' button (4). Navigation icons for 'List View' (3) and other actions are visible in the top right of the ticket detail area.

Attachment	User	Modify Date/Time	Size	File Extension
Gold Screenshot	Access, Web	1/15/2019, 10:59 AM	0 KB	docx

## Looking up an Existing Ticket

If you have just logged on to the Ticket Portal, click on 'Tickets' on the left-hand side (you will also get this screen when you use 'List View'). You will then see three tabs:



**Open Tickets** – This tab will list any tickets that are open. You can see the status of the tickets, for example 'In Process' when we are currently working on the ticket, or 'Waiting for Client' when we are waiting for further information or confirmation from you.

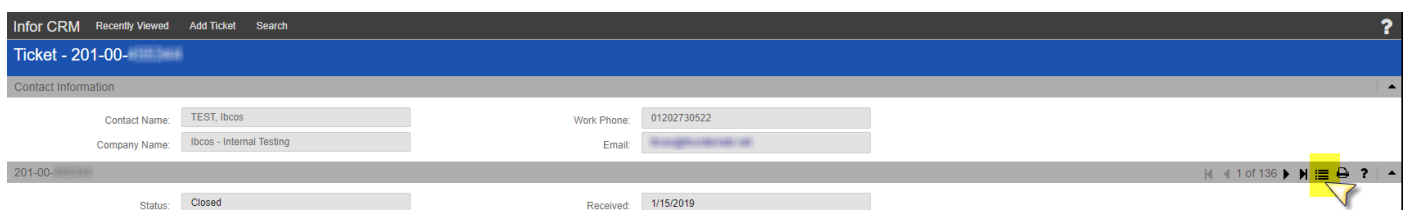
**Closed Tickets** – This will show all tickets your company has logged with us, which we have completed.

**All Tickets** – This will give you an overview of all tickets whether they are open or closed.

Click on the Ticket ID to access the ticket details. You can look in the 'Comments' tab to find any updates from us. Note that there will not always be comments on a ticket, depending on the type of query and whether it is an ongoing investigation or not.

Once a ticket has been closed by one of our Support Analysts, the Resolution will be filled out with the outcome of our investigation.

**Important Note:** From within a ticket, you can get back to the main list by using the 'List View' button.



## Closing Your Ticket

If you have resolved a query please close the ticket. Select the appropriate ticket and use the 'Close Ticket' button.

Infor CRM Recently Viewed Add Ticket Search

**Ticket - 201-00-11111111**

Contact Information

Contact Name: TEST, Ibcos Work Phone: 01202730522  
 Company Name: Ibcos - Internal Testing Email: [ibcos@ibcos.co.uk](mailto:ibcos@ibcos.co.uk)

201-00-11111111

Status: Open Received: 1/15/2019  
 Subject: Ibcos Customer Ticket Portal Closed:

[Close Ticket](#)

## Re-Opening a Ticket

Please only re-open a ticket if the resolution you have been provided was not satisfactory. If the same issue has reoccured or you have a new issue, please log a new ticket.

From a Closed ticket you can use the 'Re-Open Ticket' button.

Infor CRM Recently Viewed Add Ticket Search

**Ticket - 201-00-11111111**

Contact Information

Contact Name: TEST, Ibcos Work Phone: 01202730522  
 Company Name: Ibcos - Internal Testing Email: [ibcos@ibcos.co.uk](mailto:ibcos@ibcos.co.uk)

201-00-11111111

Status: Closed Received: 1/15/2019  
 Subject: Ibcos Customer Ticket Portal Closed: 1/15/2019

[Re-Open Ticket](#)

**Note:** If we have resolved one instance of a query, but a separate instance arises, this should be logged as a new ticket, but can be referenced to the original ticket number in the description.

If you do re-open a ticket, please use the 'Comments' to add in details as to why. Use 'Submit' to save these changes and the ticket owner will be notified by email.

[Comments](#) Attachments

Comments:

[Submit](#)

▼ Date/Time Comments

No records match the selection criteria.