Customer Guide to Service

esm
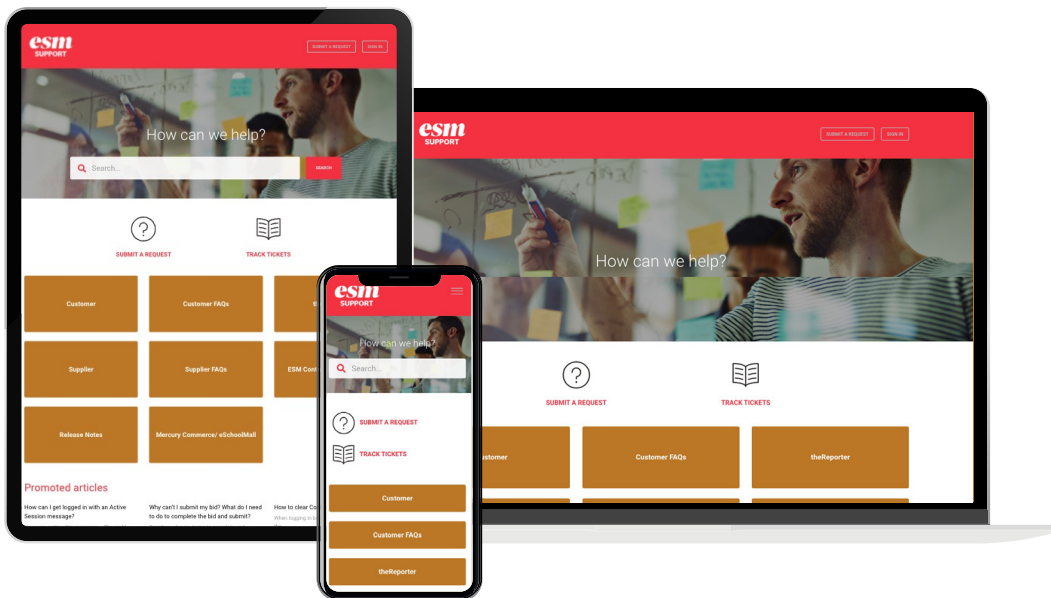SUPPORT

ESM Support Service Guide

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Overview

The purpose of this document is to provide guidance on what service options are available to ESM customers and how to access them.

All service and support material is provided through the ESM Support platform, this is a separate product and will require a different set of login credentials to be able to access all the functionality suite that is available.

Accessing ESM Support

CREATING A NEW ACCOUNT

Using the following URL, you will be directed to the main ESM Support page:

https://support.esmsolutions.com

From the landing page select **Sign in** from the top right-hand corner:

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ACTIVATING AN ACCOUNT

If you have already contacted the ESM support team via email an account will be in place for you, to access the full ESM Support suite you will need a password generating.

Using the following URL, you will be directed to the main ESM Support page:

https://support.esmsolutions.com

From the landing page select **Sign in** from the top right-hand corner:
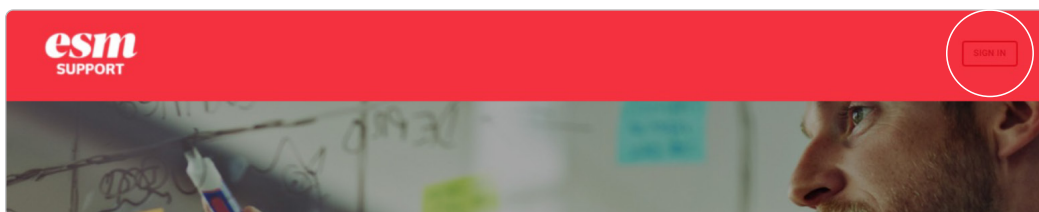
The sign in pop-out window will appear, select **Get a password:**

An email will then be sent to you with a link where you can reset your password and let you access full ESM Support suite.

RESETTING YOUR ESM SUPPORT PASSWORD
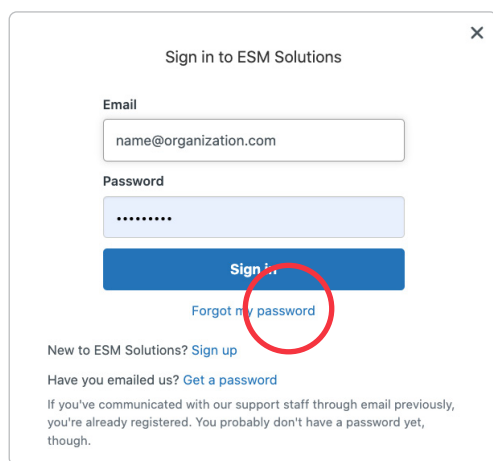
Using the following URL, you will be directed to the main ESM Support page:

https://support.esmsolutions.com

From the landing page select **Sign in** from the top right-hand corner:

The sign in pop-out window will appear, select **Forgot my password:**

An email will then be sent to you with a link where you will be able to reset your ESM Support password.

Knowledge Base Articles

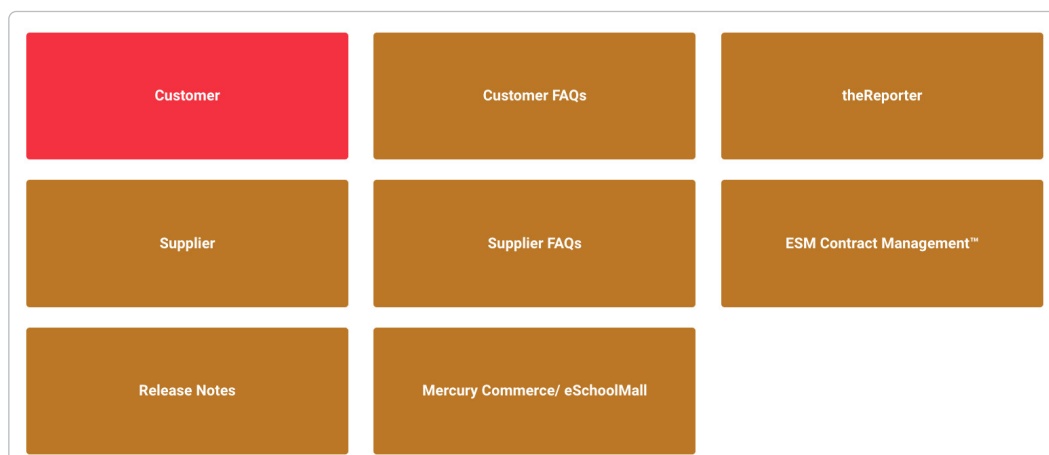## STRUCTURE

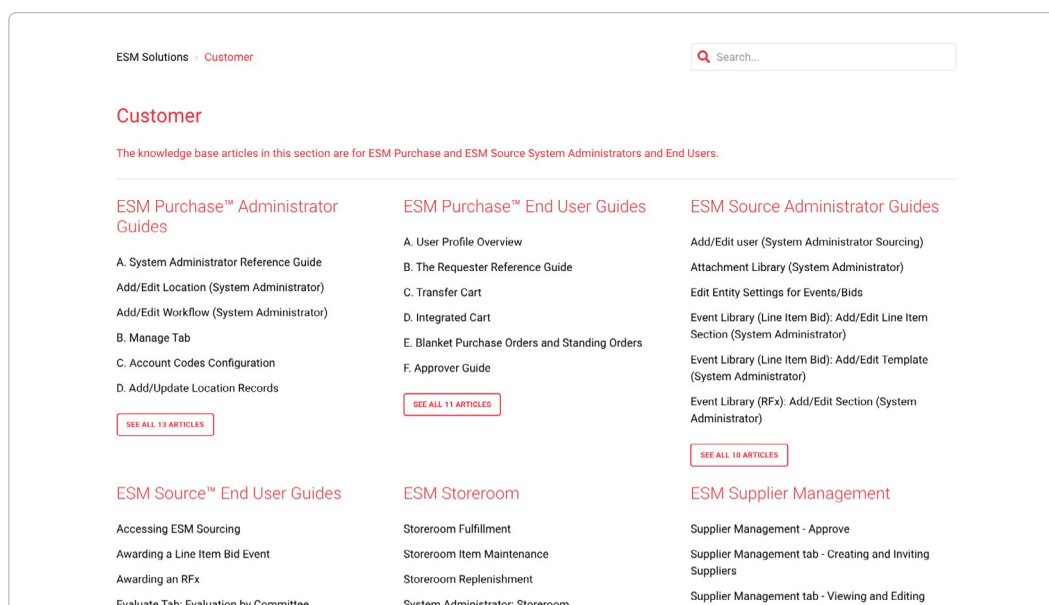Online help material is located by using the URL:

https://support.esmsolutions.com

It is organised into eight different sections to aid navigation and help you find the right help you need:

Customer	**Customer FAQs**	**theReporter**
Supplier	**Supplier FAQs**	**ESM Contract Management™**
Release Notes	**Mercury Commerce/ eSchoolMall**	

Within each section the help articles are again broken down into categories:

ESM Solutions › Customer   🔍 Search...

Customer

The knowledge base articles in this section are for ESM Purchase and ESM Source System Administrators and End Users.

ESM Purchase™ Administrator Guides

A. System Administrator Reference Guide
Add/Edit Location (System Administrator)
Add/Edit Workflow (System Administrator)
B. Manage Tab
C. Account Codes Configuration
D. Add/Update Location Records

SEE ALL 13 ARTICLES

ESM Purchase™ End User Guides

A. User Profile Overview
B. The Requester Reference Guide
C. Transfer Cart
D. Integrated Cart
E. Blanket Purchase Orders and Standing Orders
F. Approver Guide

SEE ALL 11 ARTICLES

ESM Source Administrator Guides

Add/Edit user (System Administrator Sourcing)
Attachment Library (System Administrator)
Edit Entity Settings for Events/Bids
Event Library (Line Item Bid): Add/Edit Line Item Section (System Administrator)
Event Library (Line Item Bid): Add/Edit Template (System Administrator)
Event Library (RFx): Add/Edit Section (System Administrator)

SEE ALL 10 ARTICLES

ESM Source™ End User Guides

Accessing ESM Sourcing
Awarding a Line Item Bid Event
Awarding an RFx
Evaluate Tab: Evaluation by Committee

ESM Storeroom

Storeroom Fulfillment
Storeroom Item Maintenance
Storeroom Replenishment
System Administrator: Storeroom

ESM Supplier Management

Supplier Management - Approve
Supplier Management tab - Creating and Inviting Suppliers
Supplier Management tab - Viewing and Editing Suppliers

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Clicking into one of the article titles will open the full article for reading:

SEARCHING WITHIN HELP

The most efficient way to get to the help you require is to use the search bar found on the landing page of ESM Support help:
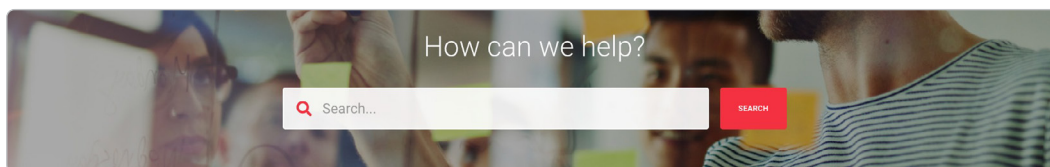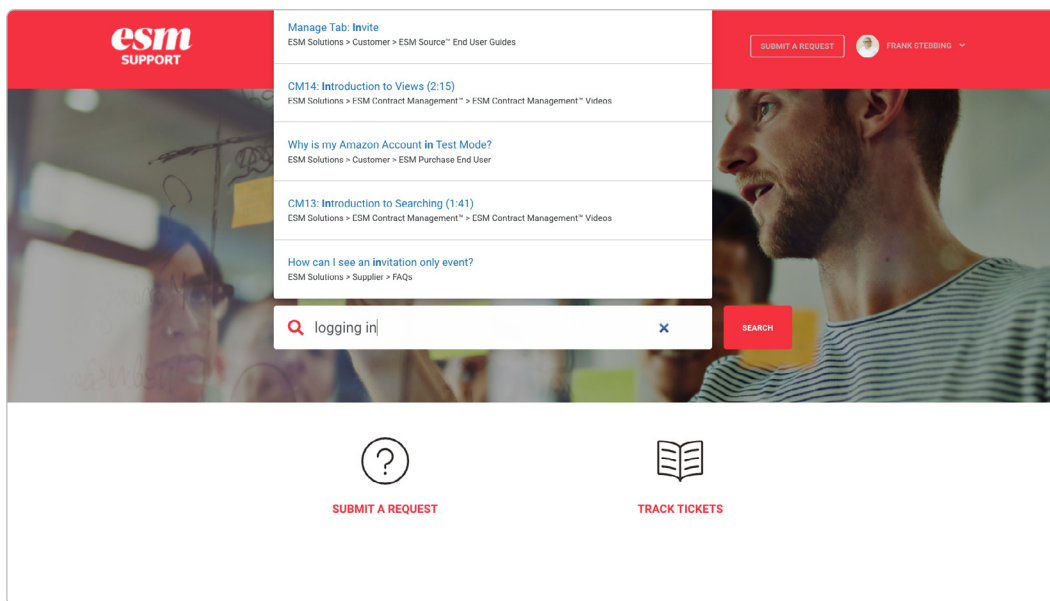

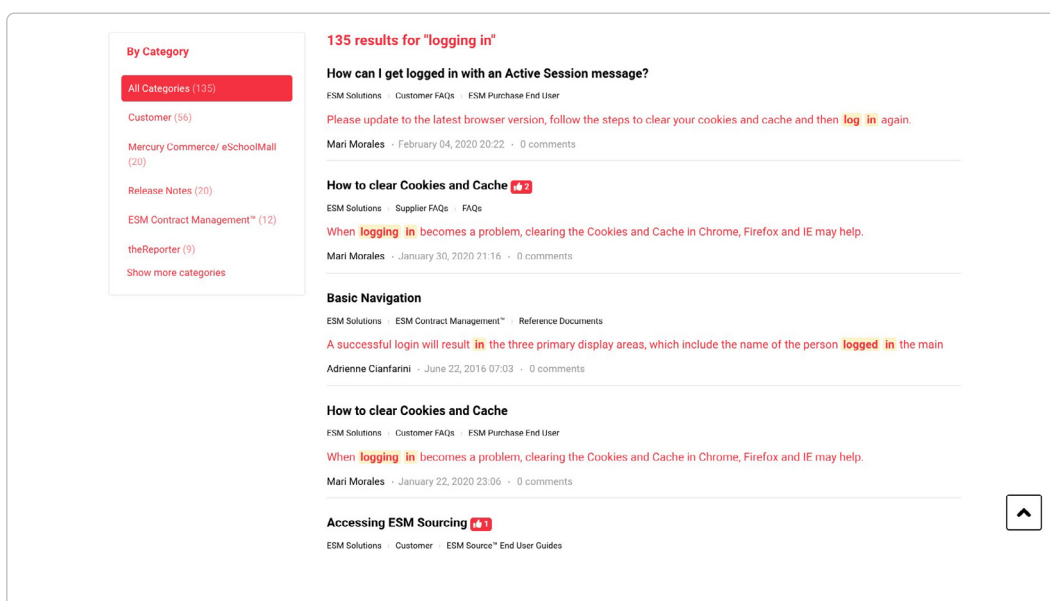In this bar enter what you need help with, in the below example I am asking for help on logging in:
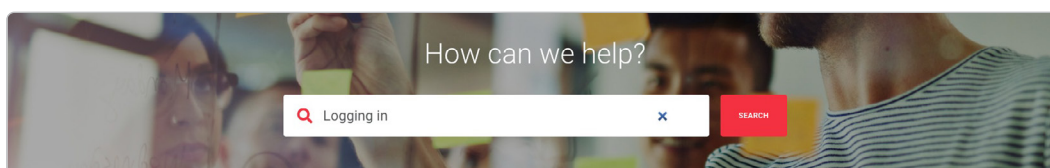
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Help will display the top results based on text entered as below, if the article you want to view shows in this list simply click the blue text. Otherwise press Enter key to see full results:
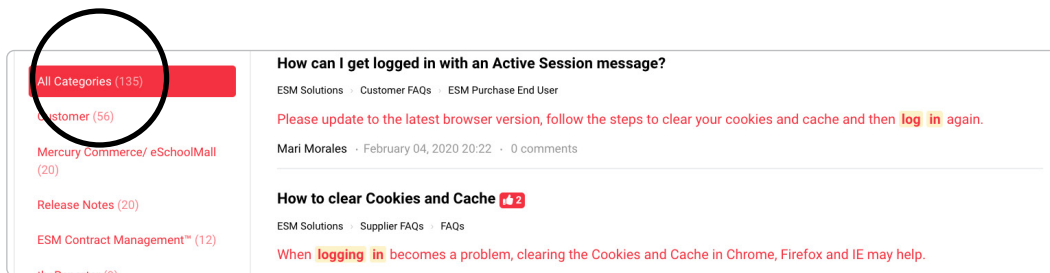

The full results screen will then appear

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Articles that have been returned as results can be further filtered down using the **By Type** area on the left-hand side of the screen:

FOLLOWING AN ARTICLE

Each article that has been created can be followed, so that in the instance that the article is ever updated in any way a notification will be generated.

Once within the article you wish to follow, the button can be found in the top-right hand side of the screen:
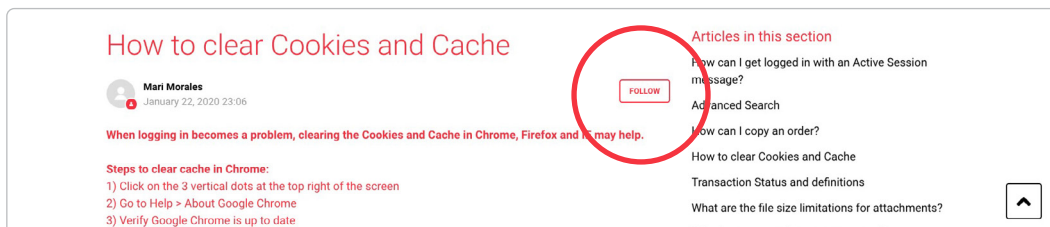
Once select the box will change text to Unfollow:

Each time this article is now ever updated or changed in any way an email notification will be generated automatically and sent to advise of this.
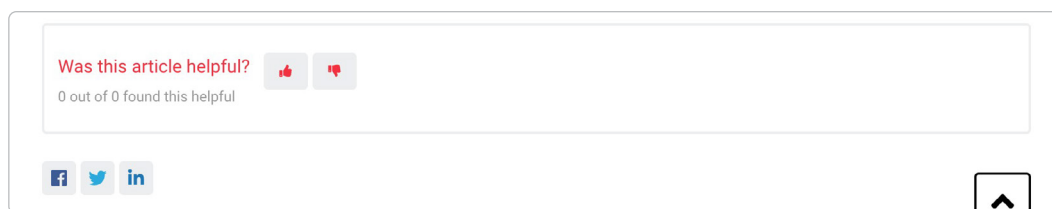
To unfollow the article, click **Unfollow.** The box fill will then return to original setting:
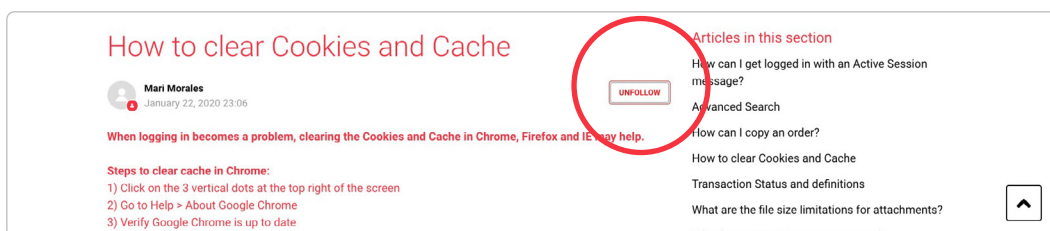
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RATING AN ARTICLE

Towards the bottom of each article there is a section where can you let support team know whether this article has been useful to you.
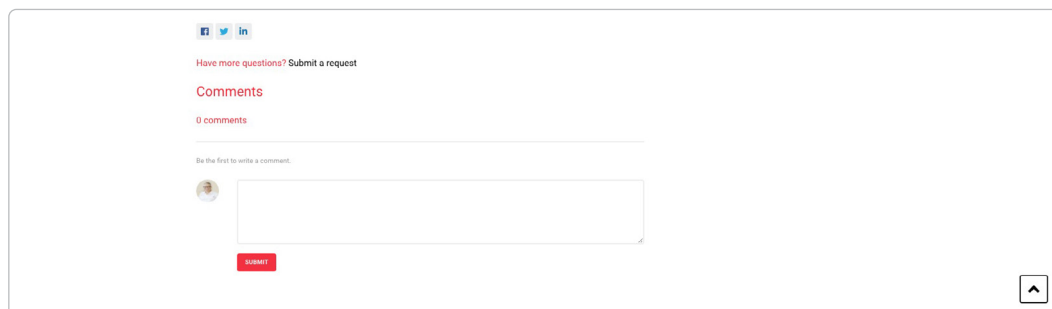

Click either Thumbs Up or Thumbs Down button to set whether you found the article useful.

The counter will automatically update when selection is made.

COMMENTING ON ARTICLE

Found at the bottom of each article, there is a section where you can add comments:

This can be particularly useful should you come across any error in the article or find that it is no longer applicable.

As soon as a comment is added to any article the support team are notified.
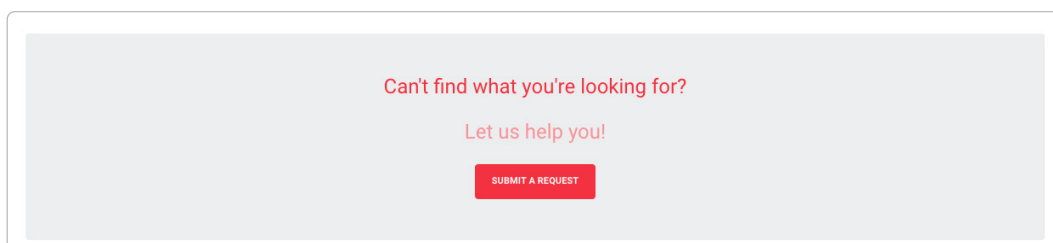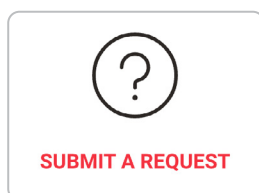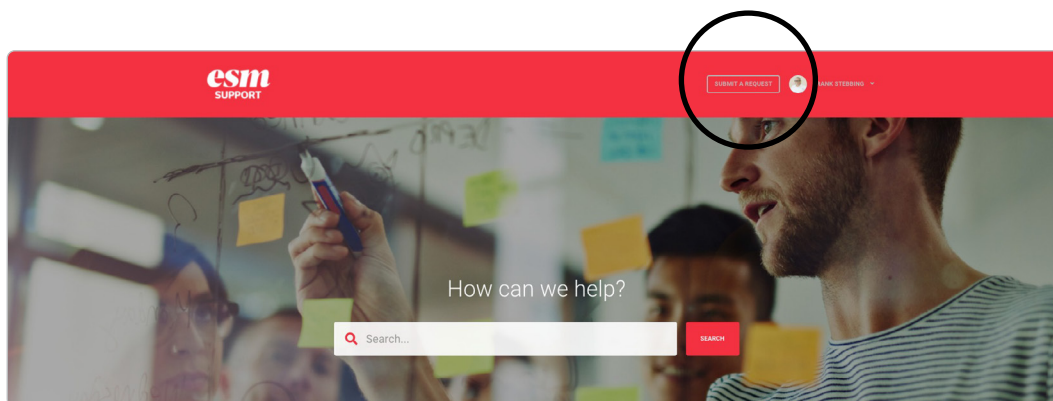
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Raising a support ticket

In the event that the online help was not able to resolve the issue you are facing or provide the guidance needed a support ticket can be raised. This can be done in three different ways.

ONLINE SUBMISSION FORM

Having accessed the ESM Support support URL (*https://support.esmsolutions.com*) and logged in using your email address, there are 3 **Submit a request** links found on the home screen:

SUBMIT A REQUEST

Can't find what you're looking for?

Let us help you!

SUBMIT A REQUEST

By clicking these links, the online form will load.

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ONLINE SUBMISSION FORM

Subject brief title of the issue being faced, or help needed.
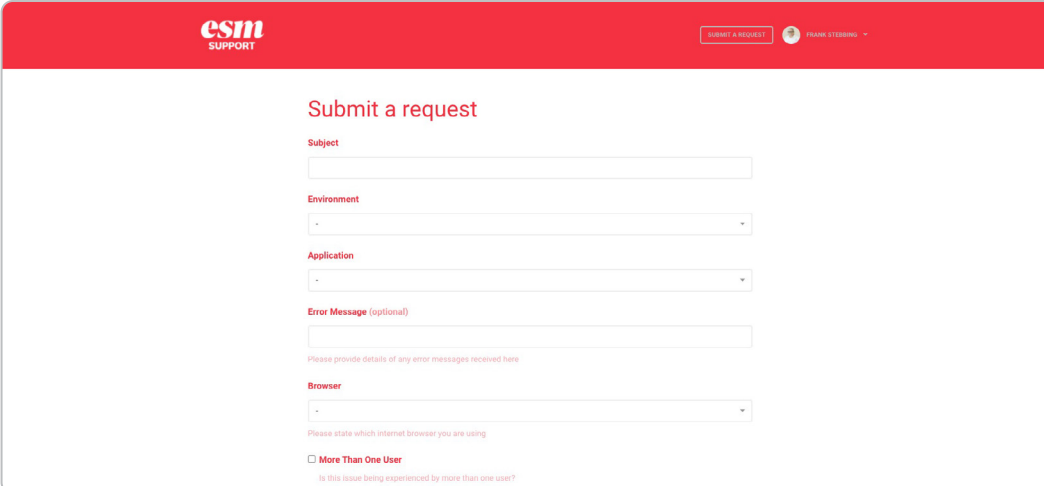
Environment within which environment you have experienced an issue.

Application when using which ESM application did you see the issue.

Error Message if an error message is being given, please include details here.

Browser which web browser you are using.

More than user tick this box if the issue has been experienced by more than one user.

CONTINUES

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ONLINE SUBMISSION FORM (CONTINUED)

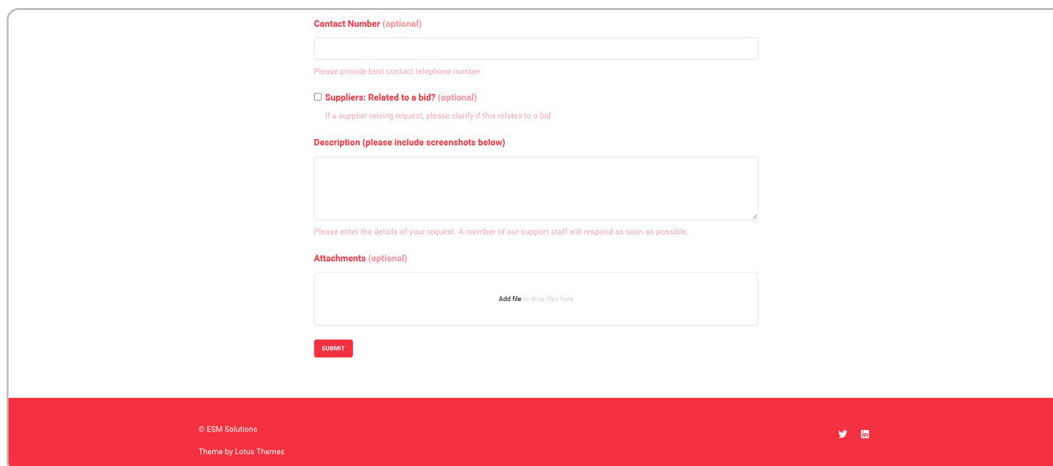**Contact number** if you would like a call back on this, please include contact number here.

Suppliers: Related to a bid? for supplier user ONLY, tick if this is issue is preventing bid submission.

Description enter into this box the full detail of the issue being faced, or help needed. Screenshots to highlight what is being raised are extremely helpful here.

Attachments any other helpful documents or images that expand on the issue being faced, or help needed can be included here.

Click **Submit** to complete your online help request form, this will then automatically be placed in to the ESM Support Support platform and given a ticket reference number.

Once this has been reviewed and investigated by a member of the support team, they will contact you via the email address provided.

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EMAIL INTO SUPPORT TEAM

The support team can be contacted by email using: *support@esmsolutions.com*

At the point of receipt this email will be added automatically into ESM Support Support and a confirmation email provided to the sender providing the ticket reference number.

PHONING THE SUPPORT TEAM

By calling the support team on: *877 969 7246* you can speak to an operative.

Once your call has been completed this will be added to the ESM Support Support platform and a ticket reference number generated, this will be provided to the caller.
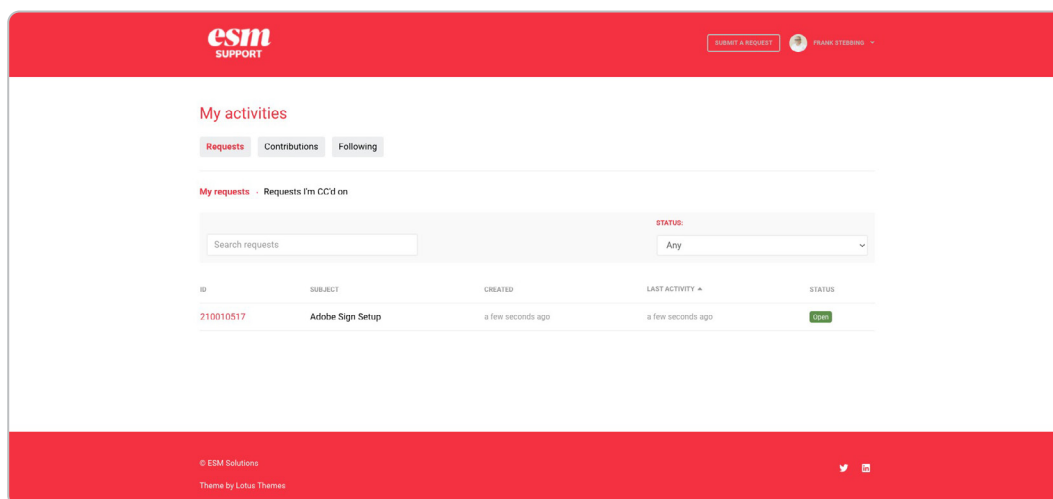
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Tracking a raised ticket

Having accessed the ESM Support support URL (*https://support.esmsolutions.com*) and logged in using your email address, select **Track Tickets** from the home page:
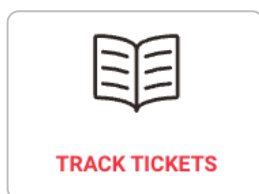
A list of tickets you have created will appear:

Within this screen there are two areas where raised tickets can be tracked.

MY REQUESTS

In this section of *My Activities* all tickets that have been raised by yourself can be viewed.

REQUESTS I'M CC'D ON

In this section of *My Activities* all tickets where you have been copied into a request can be viewed, this view **WILL NOT** show any tickets created by you individual. Please see *My Requests* section review those tickets.