

Customer Guide to Service

esm
SUPPORT

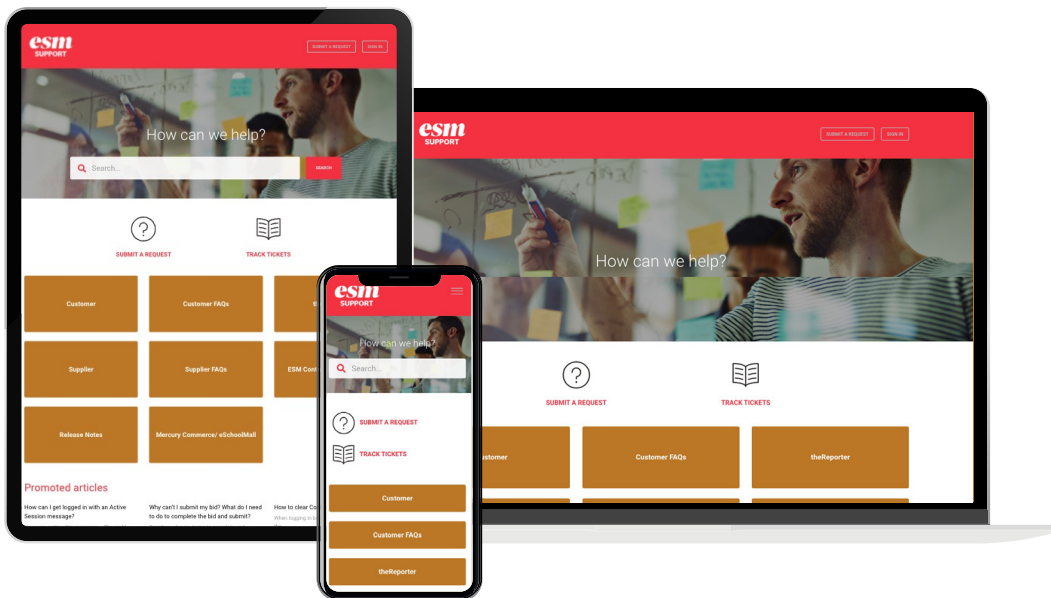


ESM Support Service Guide

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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:

×

Sign in to ESM Solutions

Email

Password

Sign in

[Forgot my password](#)

New to ESM Solutions? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

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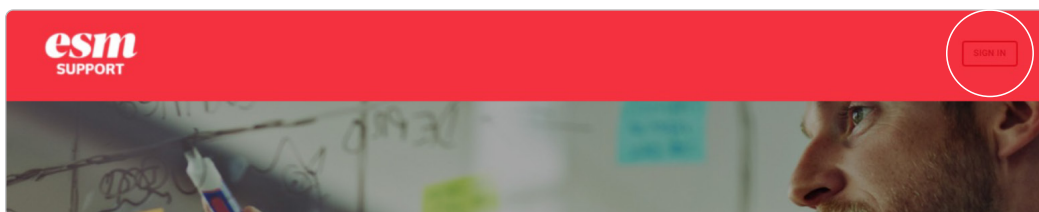
ACTIVATING AN ACCOUNT

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:**

Sign in to ESM Solutions

Email
name@organization.com

Password
.....

Sign in

[Forgot my password](#)

New to ESM Solutions? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

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.

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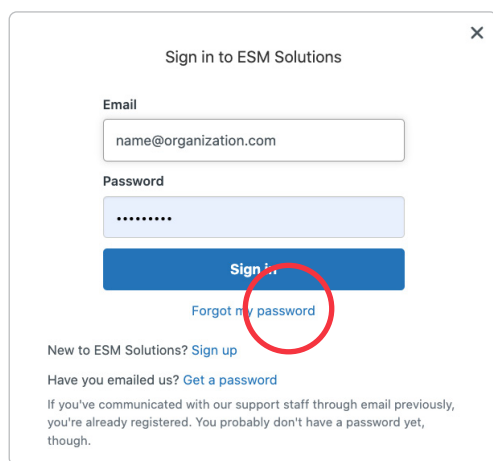
RESETTING YOUR ESM SUPPORT PASSWORD

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:**

A screenshot of a 'Sign in to ESM Solutions' pop-up window. The window has a title bar with a close button (X). It contains two input fields: 'Email' with the placeholder 'name@organization.com' and 'Password' with masked characters. Below the password field is a blue 'Sign in' button. A red circle highlights the 'Forgot my password' link located below the 'Sign in' button. At the bottom of the window, there is a link for 'New to ESM Solutions? Sign up' and a section titled 'Have you emailed us? Get a password' with a subtext explaining that users who have communicated with support staff via email are already registered but may not have a password yet.

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

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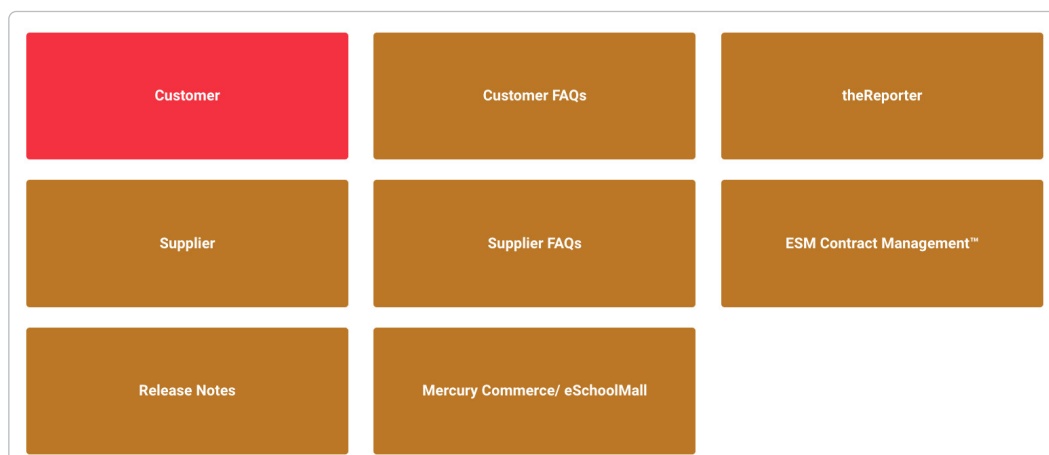
Knowledge Base Articles

STRUCTURE

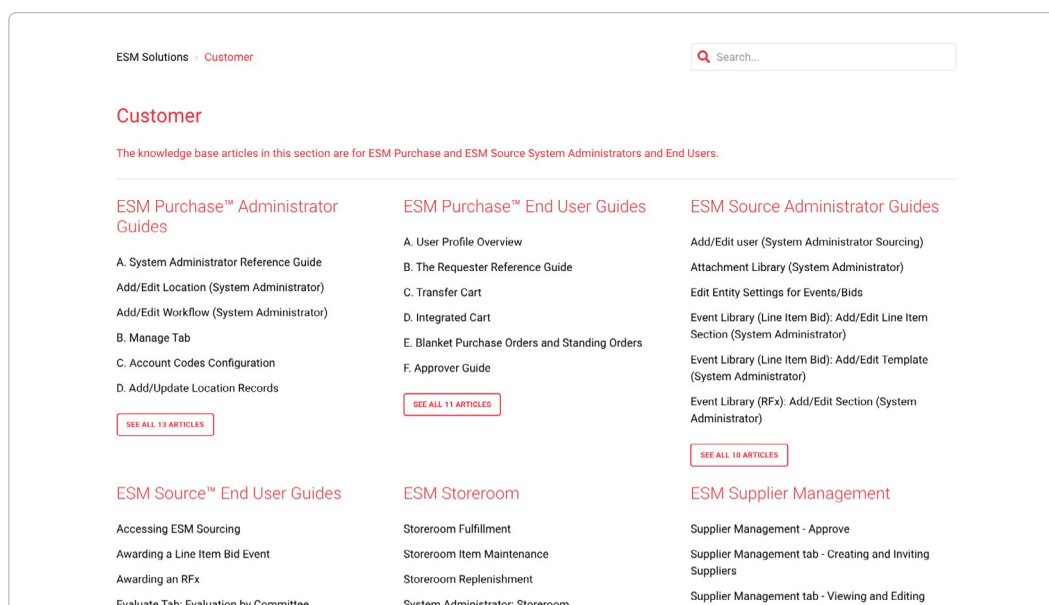
Online help material is located by using the URL:

<https://support.esmsolutions.com>

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



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



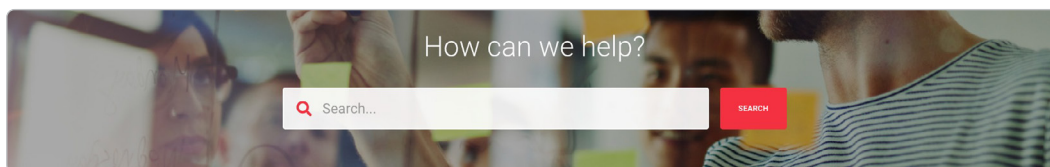
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Clicking into one of the article titles will open the full article for reading:

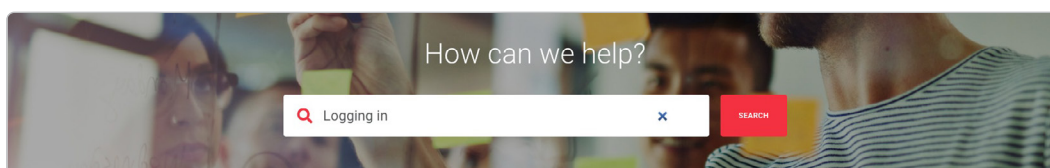
The screenshot shows a web page for the article 'A. User Profile Overview' by Adrienne Cianfarini, dated August 06, 2016. The page includes a search bar at the top right and a list of 'Articles in this section' on the right side. The main content area features a red heading 'A. User Profile Overview' and a sub-heading 'Accessing the Profile'. Below this, there is a screenshot of the ESM user interface showing the 'Profile' tab selected in the top navigation bar. The 'Profile' tab is highlighted with a red box. Below the 'Accessing the Profile' section, there is another red heading 'Changing Default Bill-to and Ship-to Locations' and a sub-heading 'Users can select Edit to modify the default locations.' This is followed by another screenshot of the ESM user interface showing the 'Default Bill to' and 'Default Ship to' fields, which are highlighted with red boxes.

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:

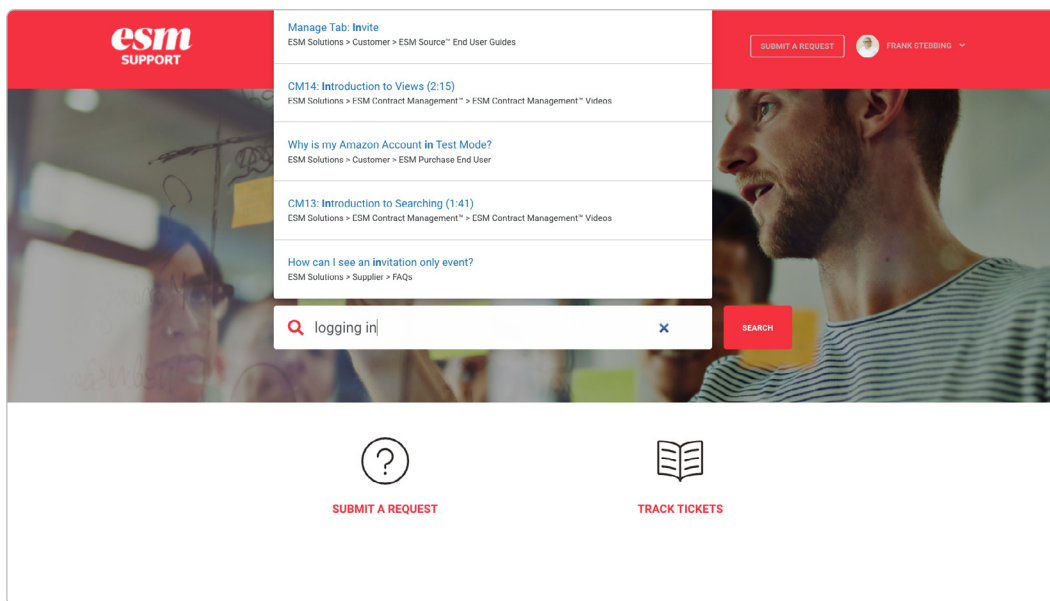


In this bar enter what you need help with, in the below example I am asking for help on logging in:

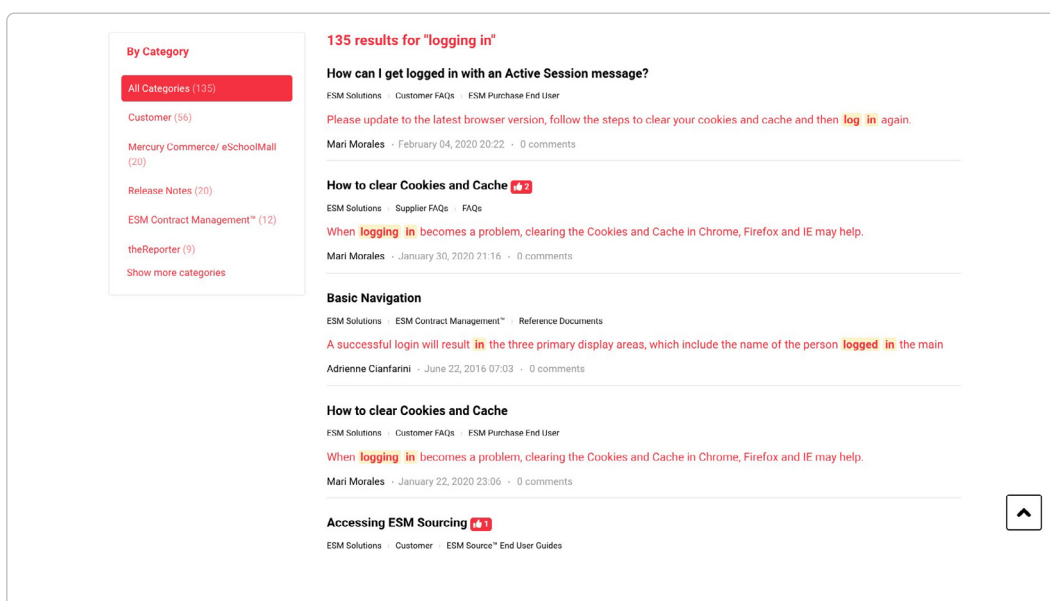


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Help will display the top results based on text entered as below, if the article you want to view shows in this list simply click the blue text. Otherwise press Enter key to see full results:

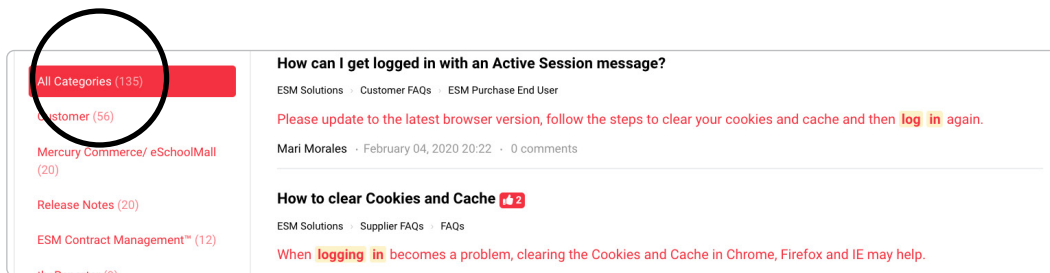


The full results screen will then appear



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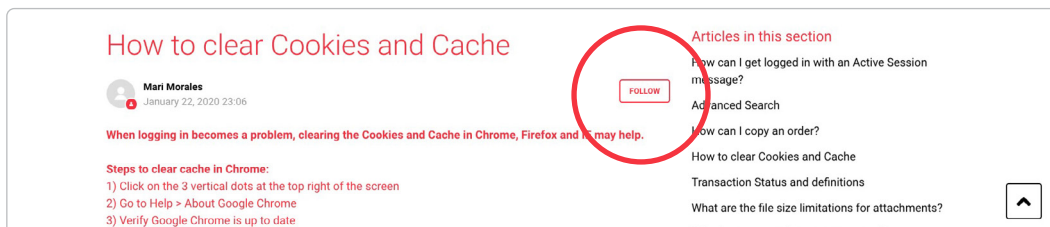
Articles that have been returned as results can be further filtered down using the **By Type** area on the left-hand side of the screen:



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.

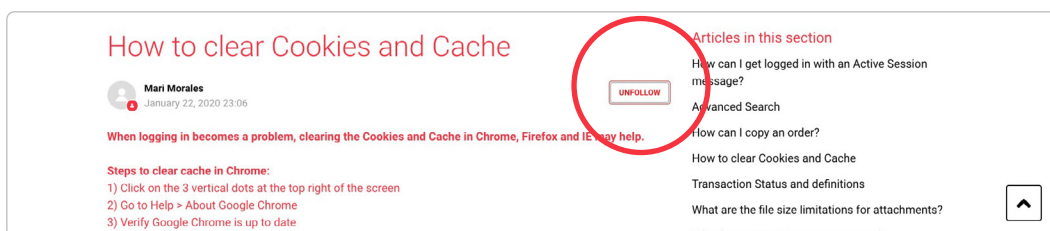
Once within the article you wish to follow, the button can be found in the top-right hand side of the screen:



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.

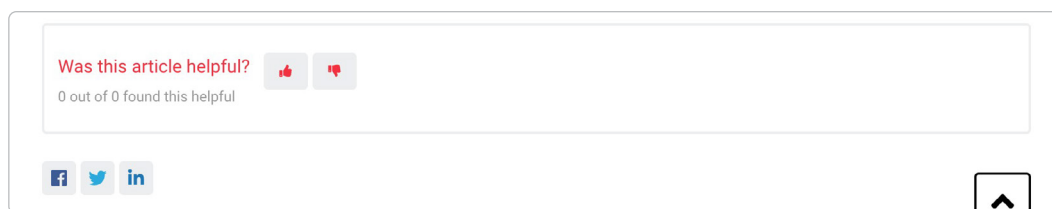
To unfollow the article, click **Unfollow**. The box fill will then return to original setting:



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RATING AN ARTICLE

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

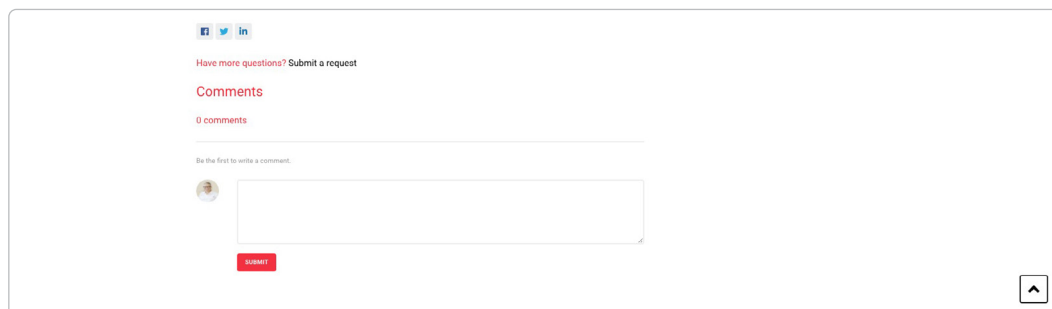
A screenshot of a web interface for rating an article. It features a white box with a light gray border. Inside, the text "Was this article helpful?" is in red, followed by two buttons: a thumbs up icon and a thumbs down icon. Below this, it says "0 out of 0 found this helpful". At the bottom left of the box are three social media icons: Facebook, Twitter, and LinkedIn. At the bottom right is a small square button with an upward-pointing arrow.

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:

A screenshot of a web interface for commenting on an article. It shows a white box with a light gray border. At the top left, there are three social media icons: Facebook, Twitter, and LinkedIn. Below them is a link that says "Have more questions? Submit a request". Underneath is the heading "Comments" in red, followed by "0 comments". Below this is a prompt that says "Be the first to write a comment." To the left of a text input field is a small circular profile picture icon. Below the input field is a red button labeled "SUBMIT". At the bottom right of the box is a small square button with an upward-pointing arrow.

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.

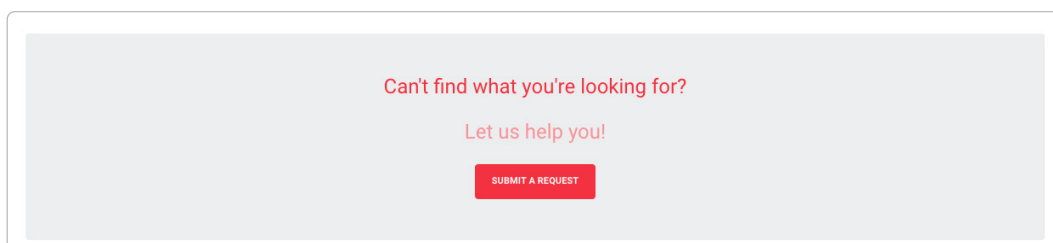
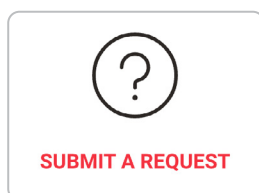
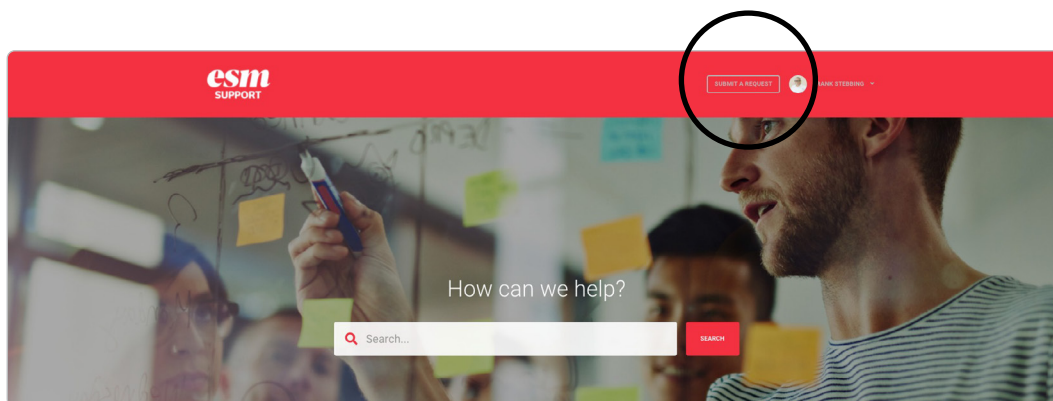
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Raising a support ticket

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:



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.

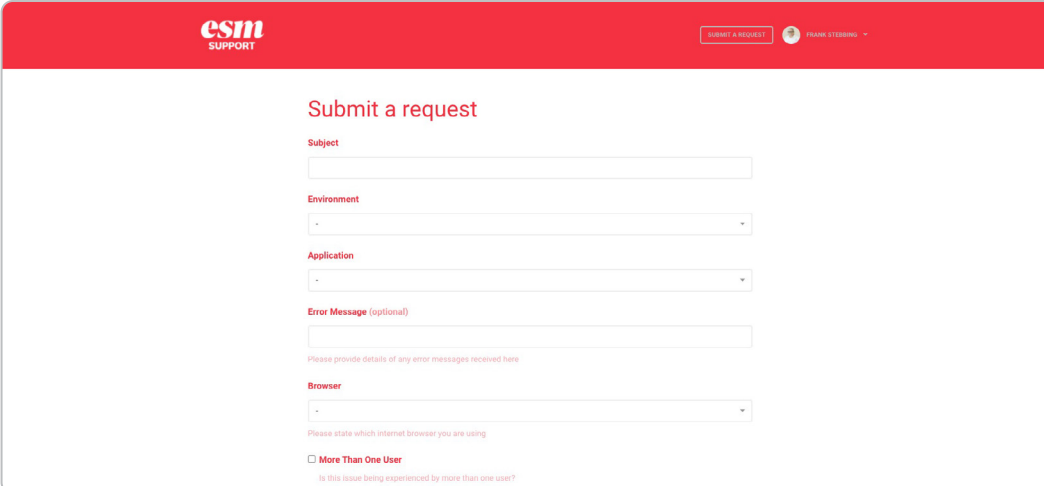
Environment within which environment you have experienced an issue.

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.



The screenshot shows the 'Submit a request' form on the ESM Support portal. The form is titled 'Submit a request' and includes the following fields:

- Subject**: A text input field.
- Environment**: A dropdown menu.
- Application**: A dropdown menu.
- Error Message (optional)**: A text input field with a placeholder text: 'Please provide details of any error messages received here'.
- Browser**: A dropdown menu with a placeholder text: 'Please state which internet browser you are using'.
- More Than One User**: A checkbox labeled 'More Than One User' with a sub-label 'Is this issue being experienced by more than one user?'.

The form is set against a red header with the 'esm SUPPORT' logo and a 'SUBMIT A REQUEST' button. The user's name 'FRANK STEDING' is visible in the top right corner.

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.

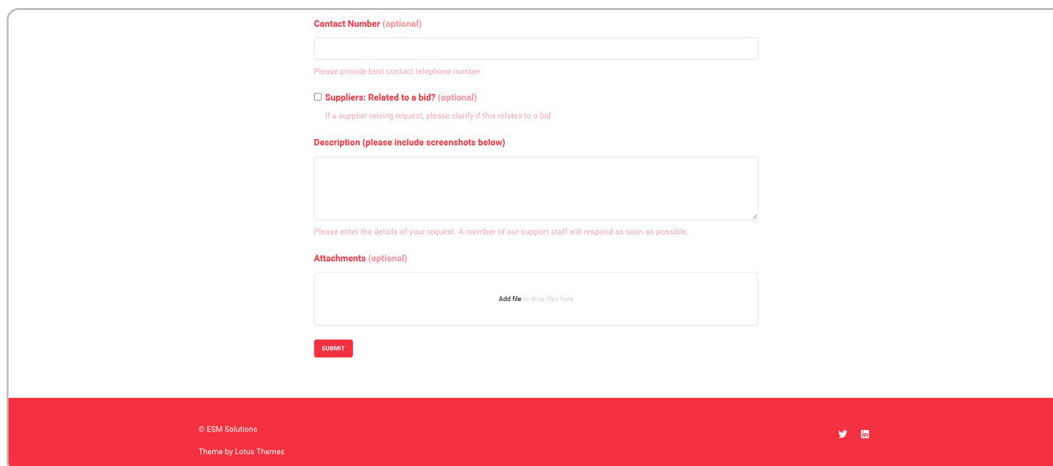
Suppliers: Related to a bid? for supplier user ONLY, tick if this is issue is preventing bid submission.

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.



The screenshot displays the 'ONLINE SUBMISSION FORM (CONTINUED)'. It features a white form area with a red header and footer. The form includes the following sections:

- Contact Number (optional)**: A text input field with a placeholder 'Please provide best contact telephone number'.
- Suppliers: Related to a bid? (optional)**: A checkbox with the instruction 'If a supplier raising request, please clarify if this relates to a bid'.
- Description (please include screenshots below)**: A large text area with a placeholder 'Please enter the details of your request. A member of our support staff will respond as soon as possible.'
- Attachments (optional)**: A file upload area with a placeholder 'Add file or drop files here'.
- SUBMIT**: A red button at the bottom of the form.

The footer of the form contains the text '© ESM Solutions' and 'Theme by Lotus Themes' on the left, and social media icons for Twitter and Facebook on the right.

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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

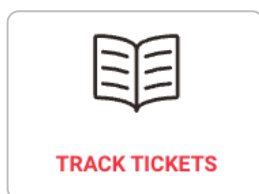
By calling the support team on: **877 969 7246** you can speak to an operative.

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.

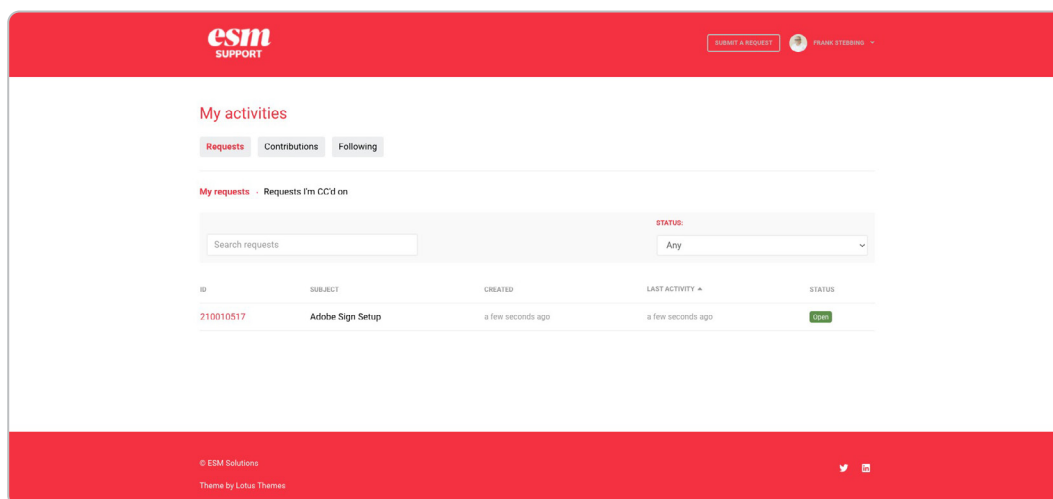
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Tracking a raised ticket

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.