Customer Portal Overview

A Replacement for the Online Support Center (OSC)

Date: November 9, 2015

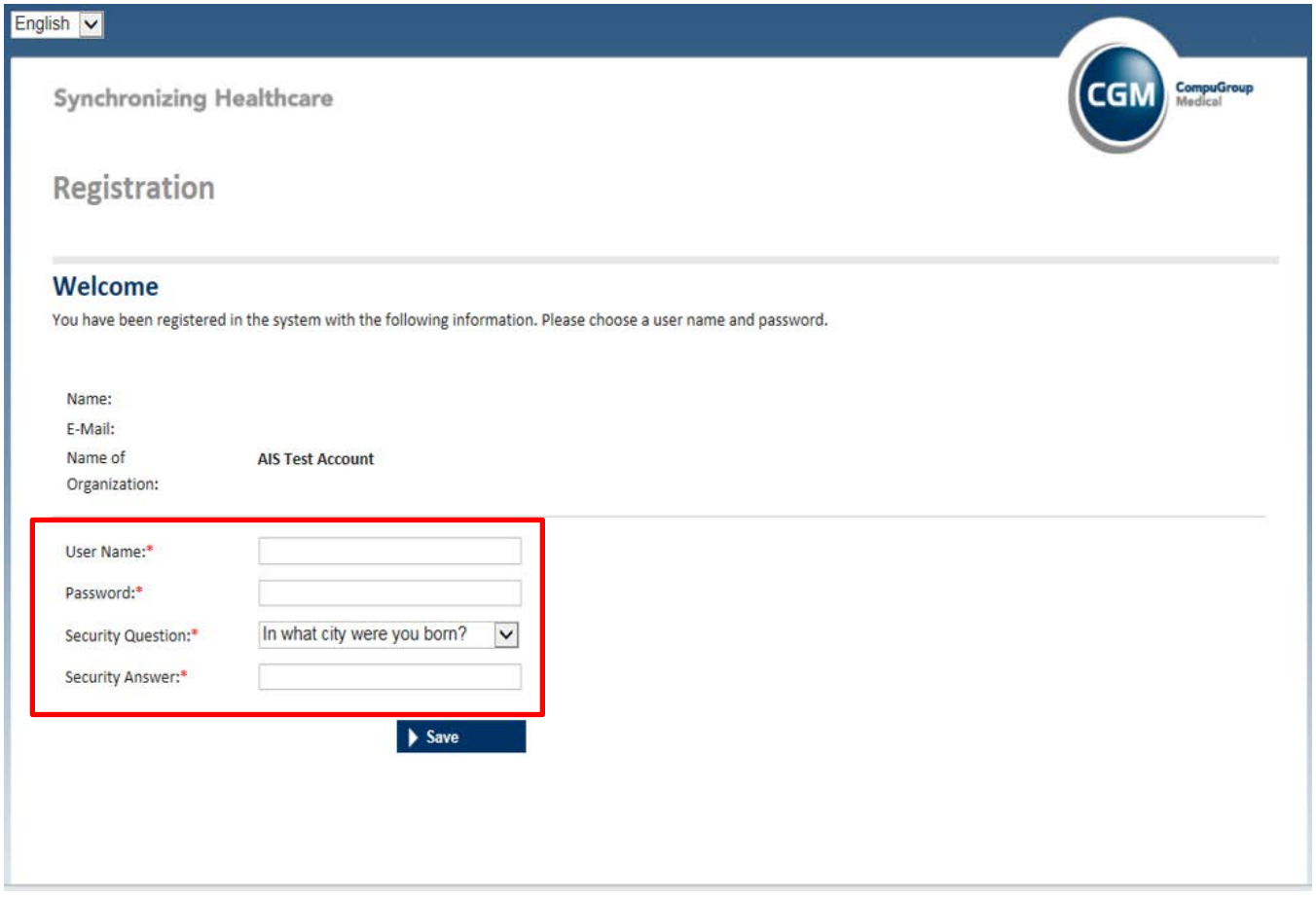
DESCRIPTION

Welcome to CompuGroup Medical's new Customer Portal! This new portal will replace the Online Support Center (OSC). **Please note that registration is required in order to access our new customer portal**. Contact our Customer Support Desk to initiate registration. To complete your registration, an activation email will be sent to your email address – please be sure to click on the link to complete the registration process.

To help you navigate the Customer Portal successfully, we've outlined steps below which also describe the new workflow and functionality you will experience.

REGISTRATION

Once Customer Support has created your user, an activation email will be generated and will include a hyper-link to finalize the process. To complete your registration, select a username/password as well as your security question/answer.



CUSTOMER PORTAL OVERVIEW

1. Login to the CGM Customer Portal by going to https://customerportal.cgm.com
2. Enter you User Name and Password combination created during your registration process.

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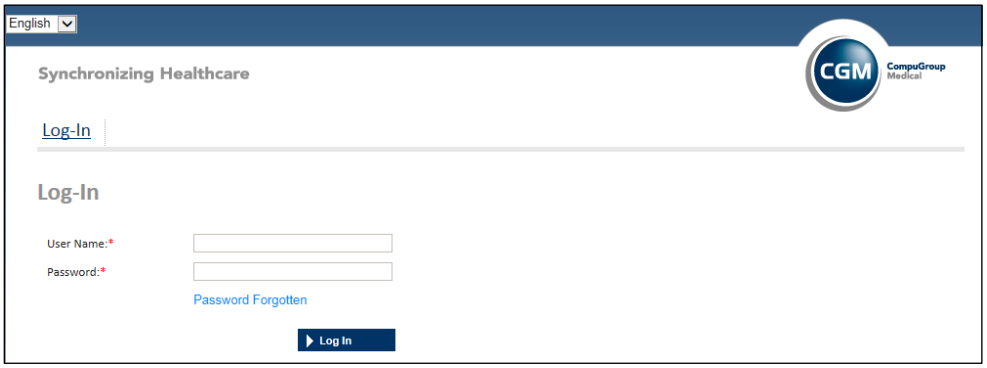

If you have not received an email to activate your customer portal account, please contact customer support for assistance.

3. Once logged in to the customer portal, Users will have the following options:
    - **Show Tickets** – review the status of tickets
    - **Create Ticket** – open and submit new support tickets
    - **Account** – change account password and set up security questions

Create Ticket

This section allows users to open and submit new support tickets. The key information to be provided for each ticket is as follows:

- **Title** – Ticket name, which serves as a brief description

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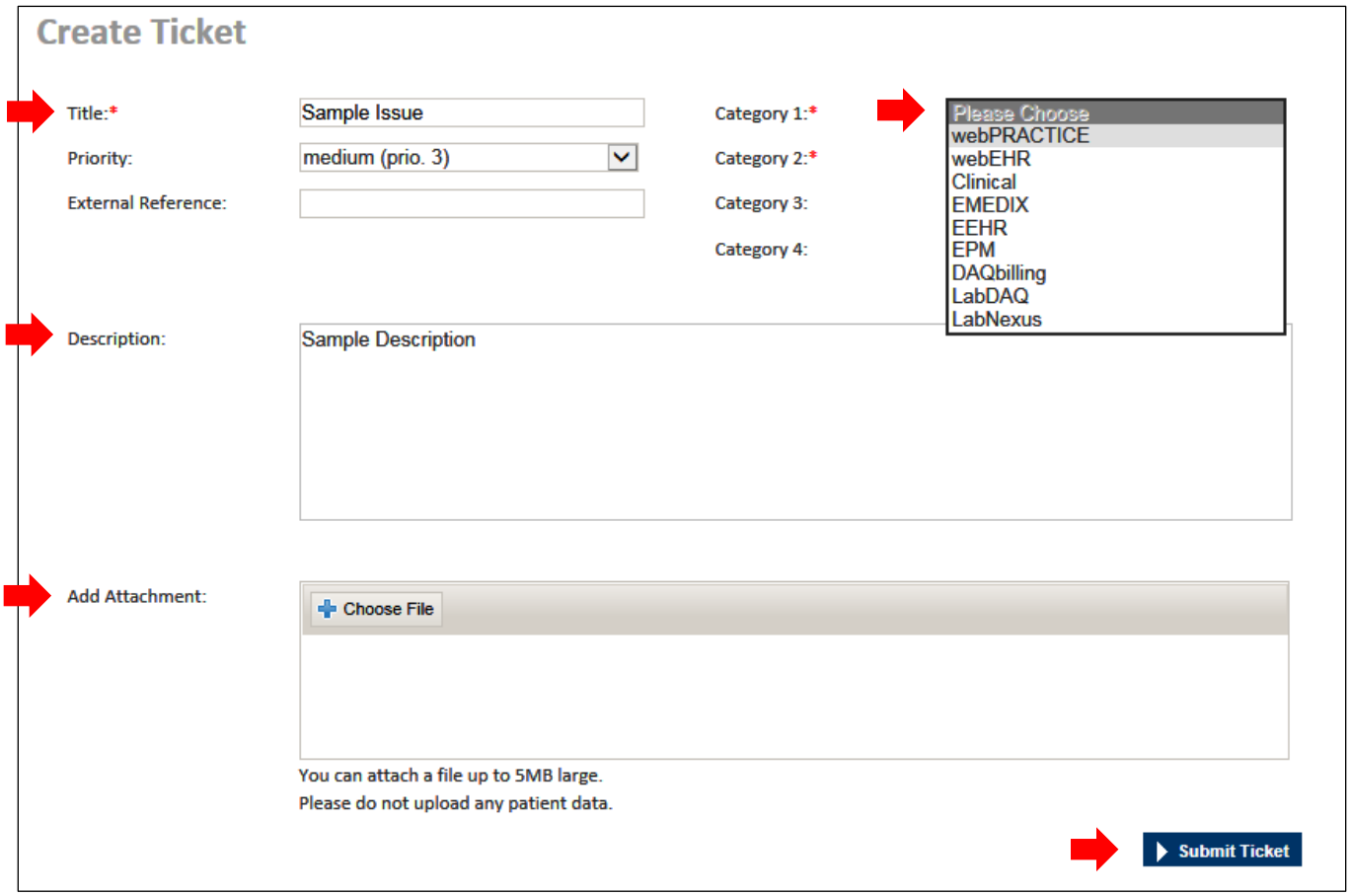
- **Category** – Drop down list of options to classify your specific problem
  - *Please select the appropriate product from Category 1 to ensure your support ticket is routed to the proper Customer Support Team.*
- **Description** – Please provide a detailed description of the issue that includes steps to reproduce the issue.
- **Add Attachment** – Please select 'Choose File' to attach any screenshots or pertinent documentation.
- **Submit Ticket** – Once the necessary information has been provided, please 'Submit Ticket' to finalize.



Note – Please provide as much detailed information as possible to ensure that Customer Support is able to quickly identify and resolve the issue. Generally, tickets should have a clear description that outlines the specific issue and the steps to recreate the issue. Screenshots are always recommended. Providing this information will reduce the turnaround time for issue resolution.

Show Tickets

This section allows users to find current and historical support tickets associated with your Account. This can be done by searching for a specific ticket name/number and/or by utilizing the filters to see the applicable tickets. To open a ticket, click on the blue hyperlink that displays the ticket number and name.

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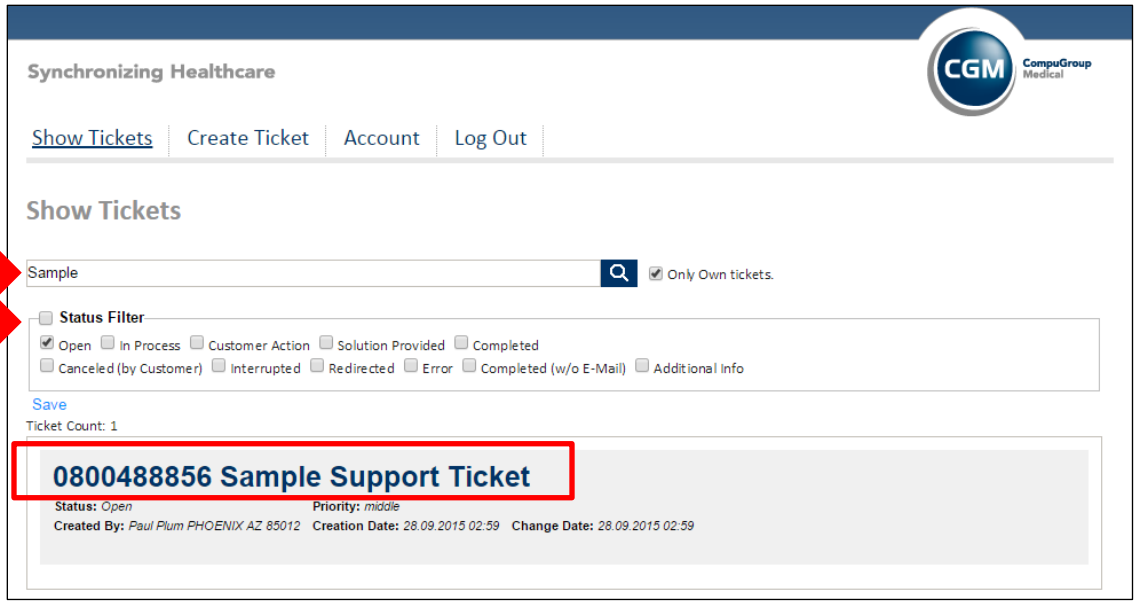
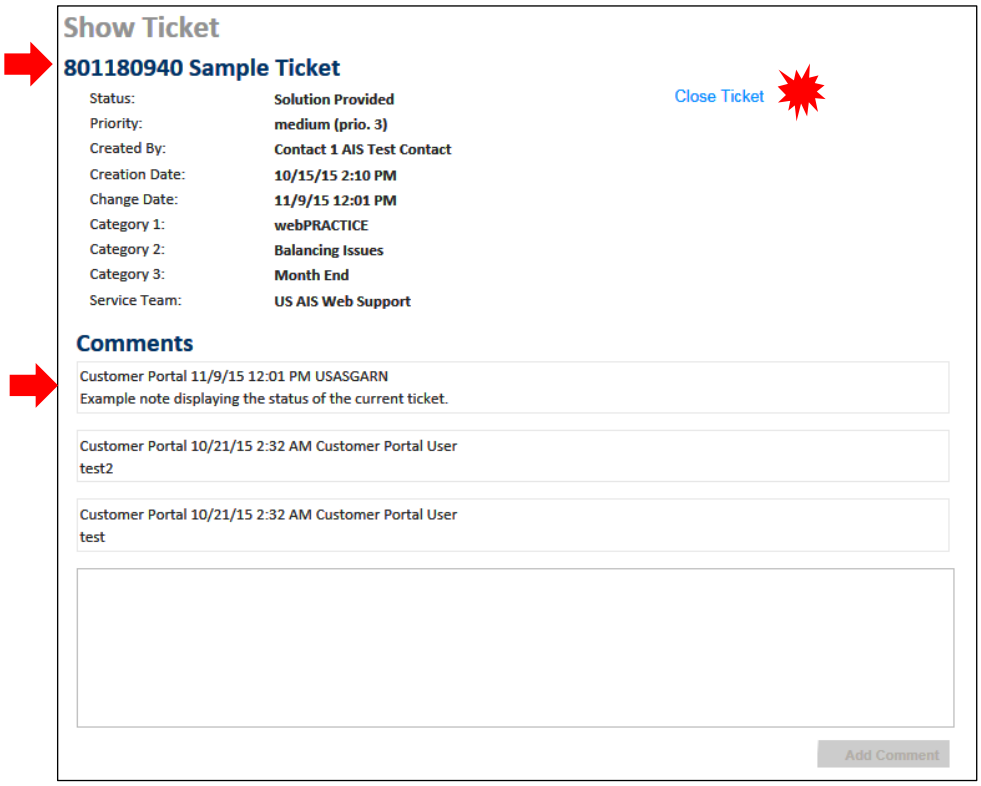


Within the ticket, you can review the current status, and add additional information such as comments or upload additional attachments. If a ticket is no longer applicable, you can select the 'Close Ticket' option.



In the comments section, you can view your comments and any updates provided by Customer Support.

Account

This section allows you to modify your user's password, and manage your Security Questions. Security Questions will be utilized in the event your password has been forgotten, and needs to be recovered.

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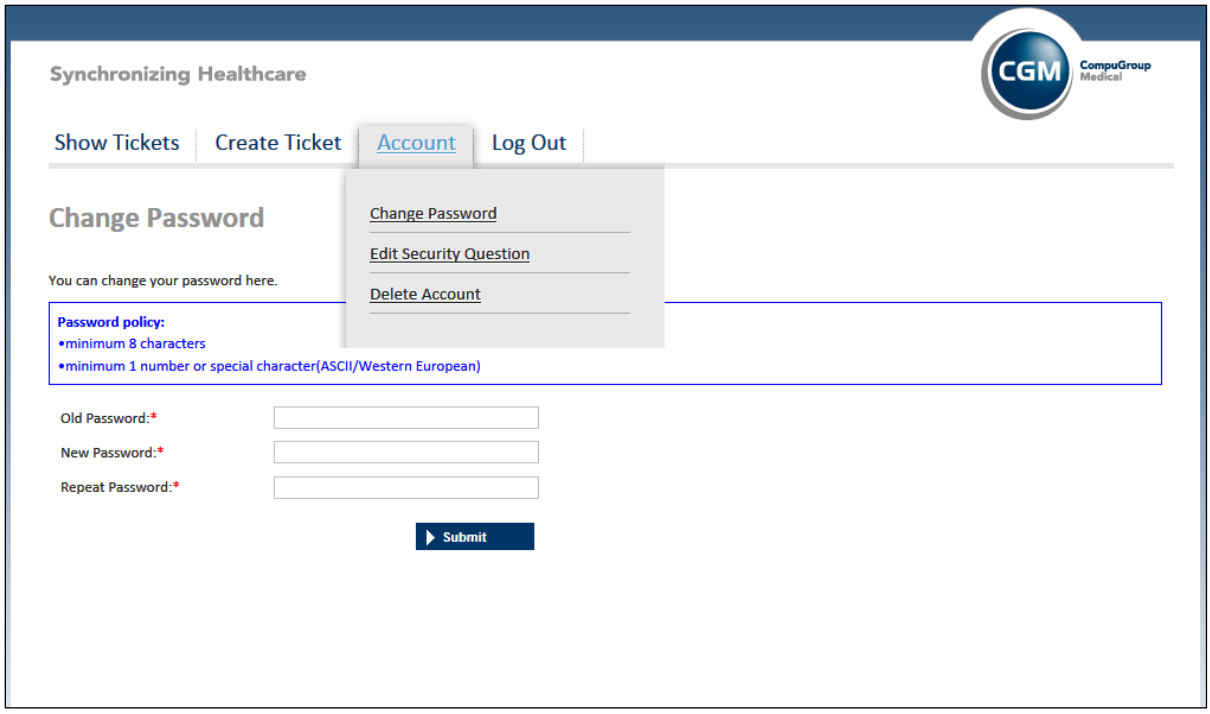

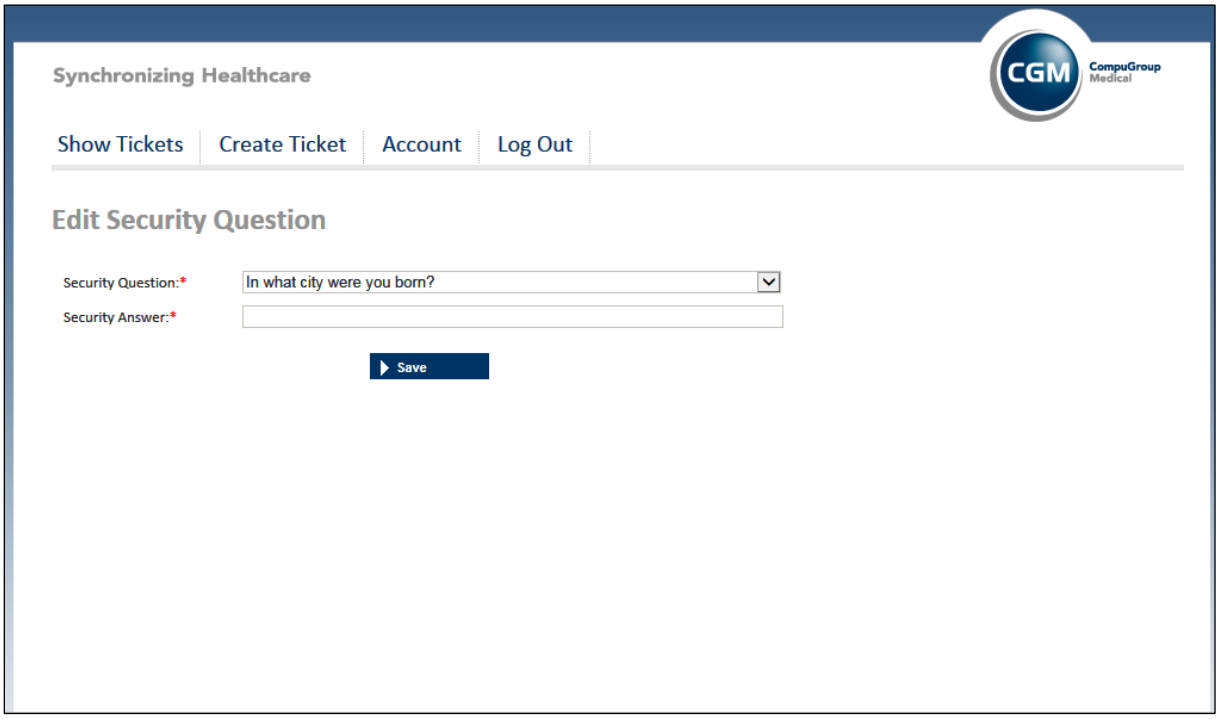

If you have any questions or concerns, please contact our Customer Support Desk.

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