Prospecta Production Support
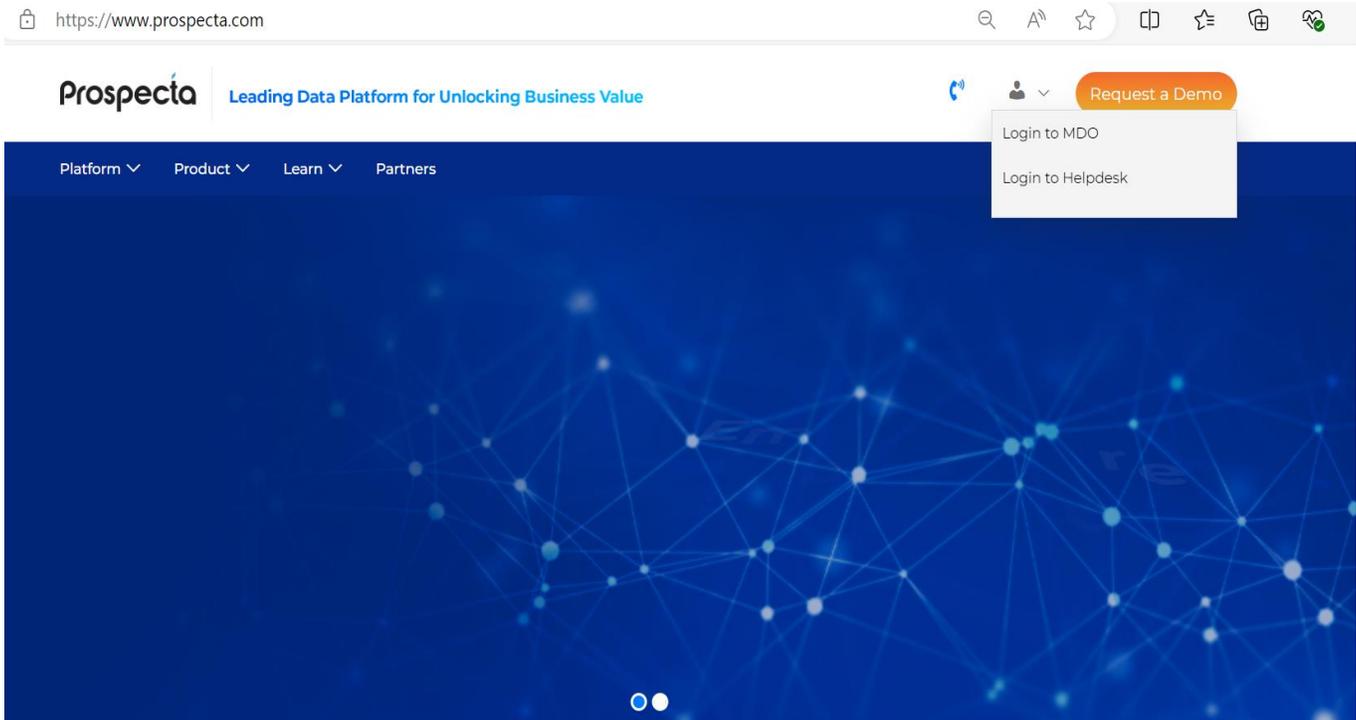
Customer Support Portal Guidelines

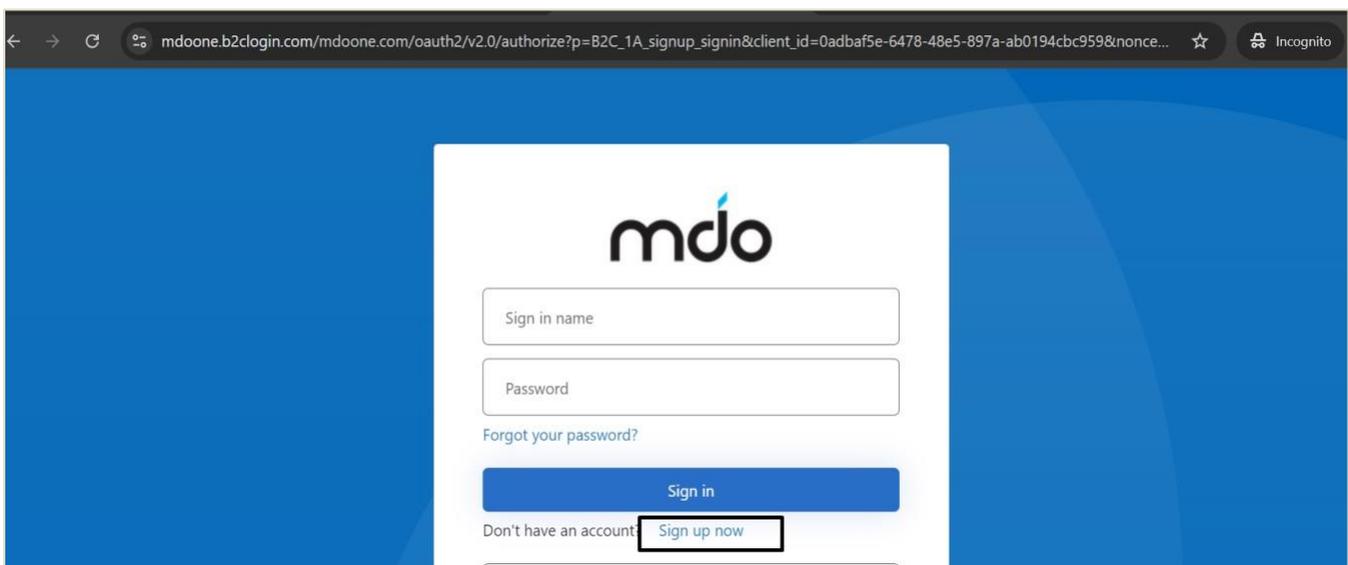# Contents

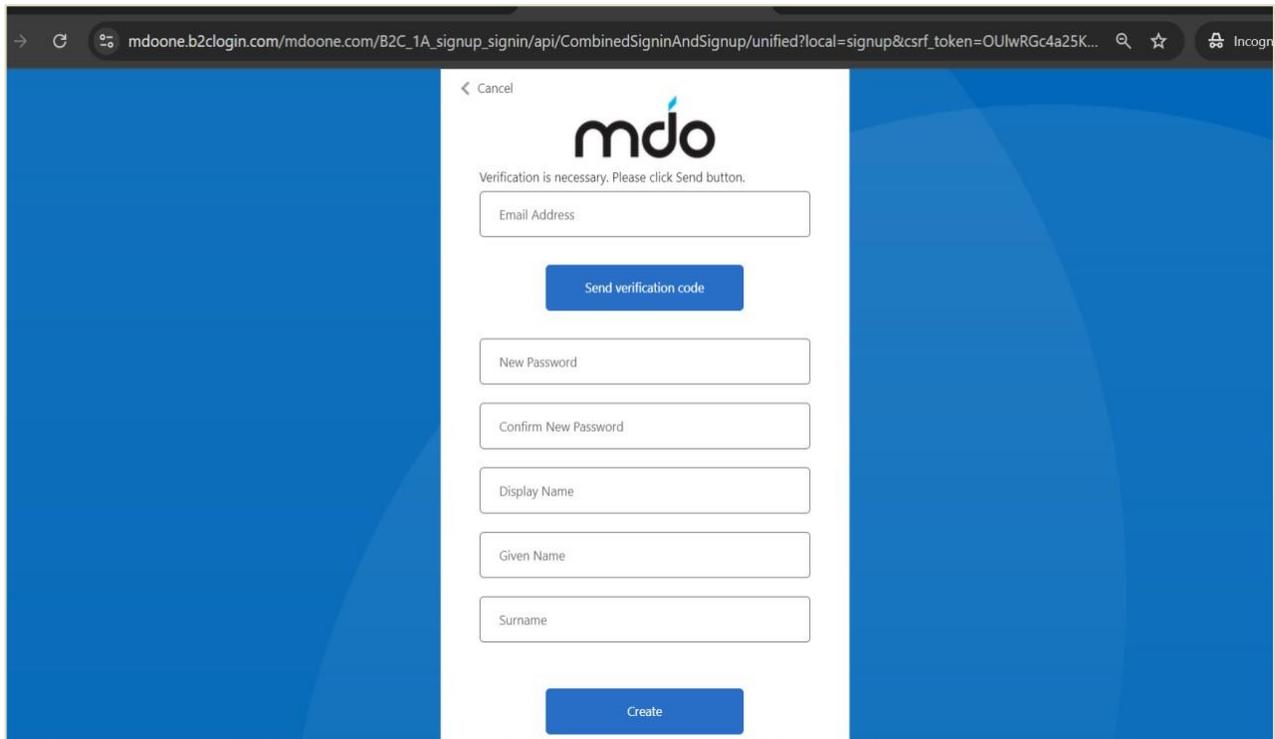# How to onboard users and access the Login Portal?

1. Go to www.prospecta.com
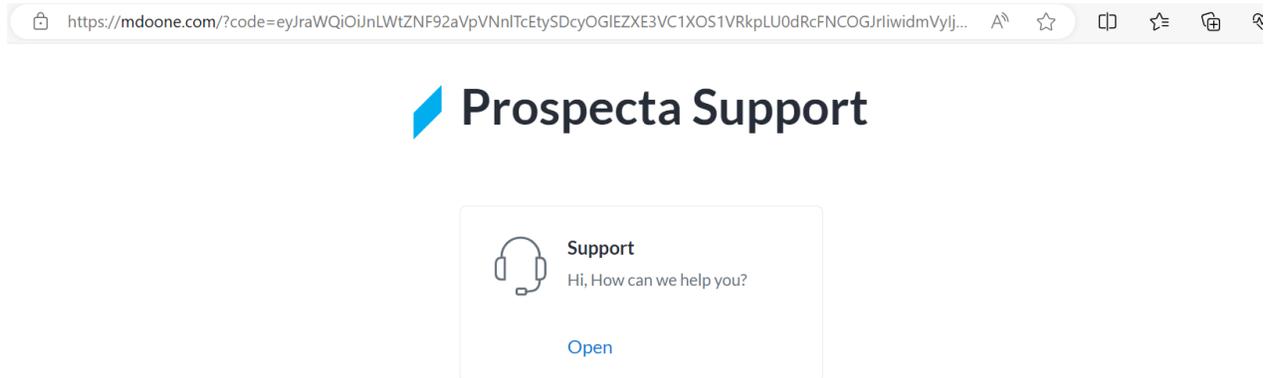2. Click on "Login to Helpdesk"

3. 1. To On-board a new user, click on "Sign Up Now"

3.2. Enter the requested details and verification code which will be sent to user's email ID, then click on" Create".

3.3. Click on "Request Access",

If the user already has access, click on 'Open.' If not, there will be an option to click on 'Request Access' under Support.

If you are an existing user, please sign – in with your username and password (screen 3.1).

3.4. Once a user is signed-in, click on the "send code" and the code will be received on the registered email ID.
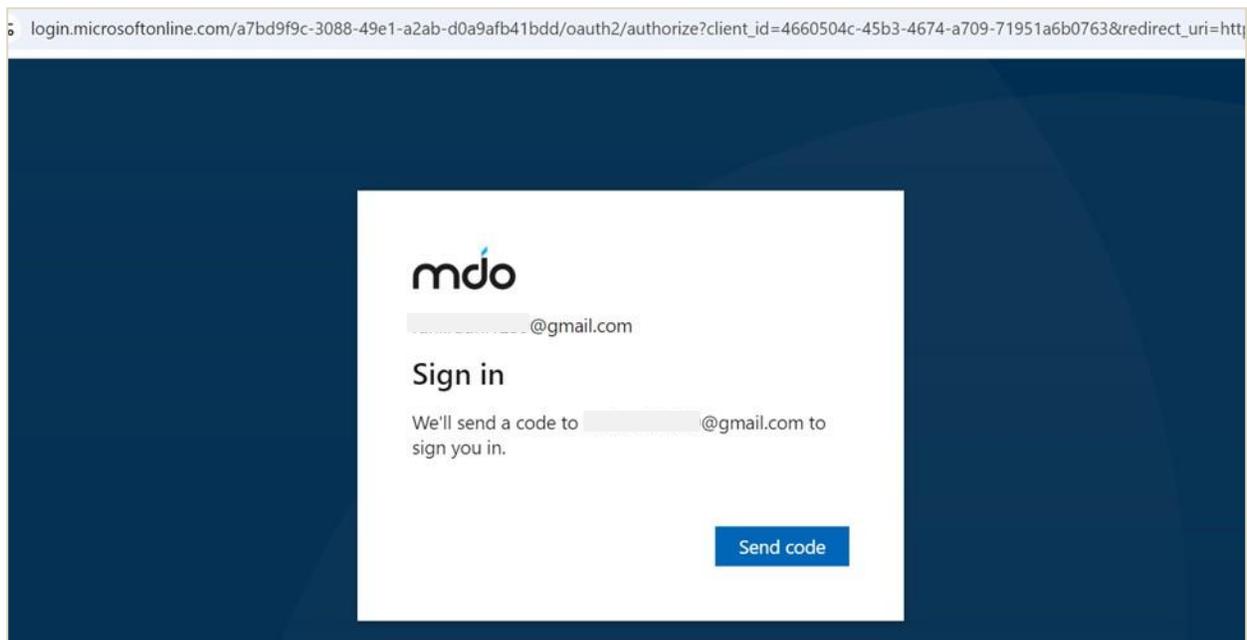
4. Enter the code and click on "Sign-In".
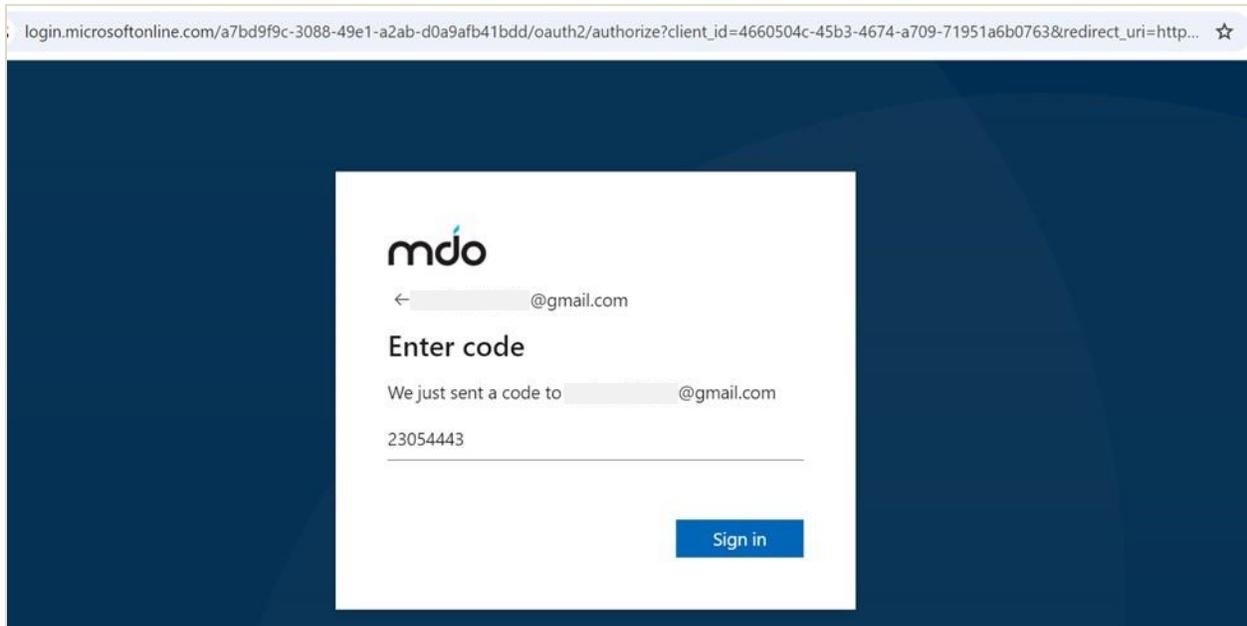
5. You will receive an email notification to accept the invitation. Click on "Accept Invitation".
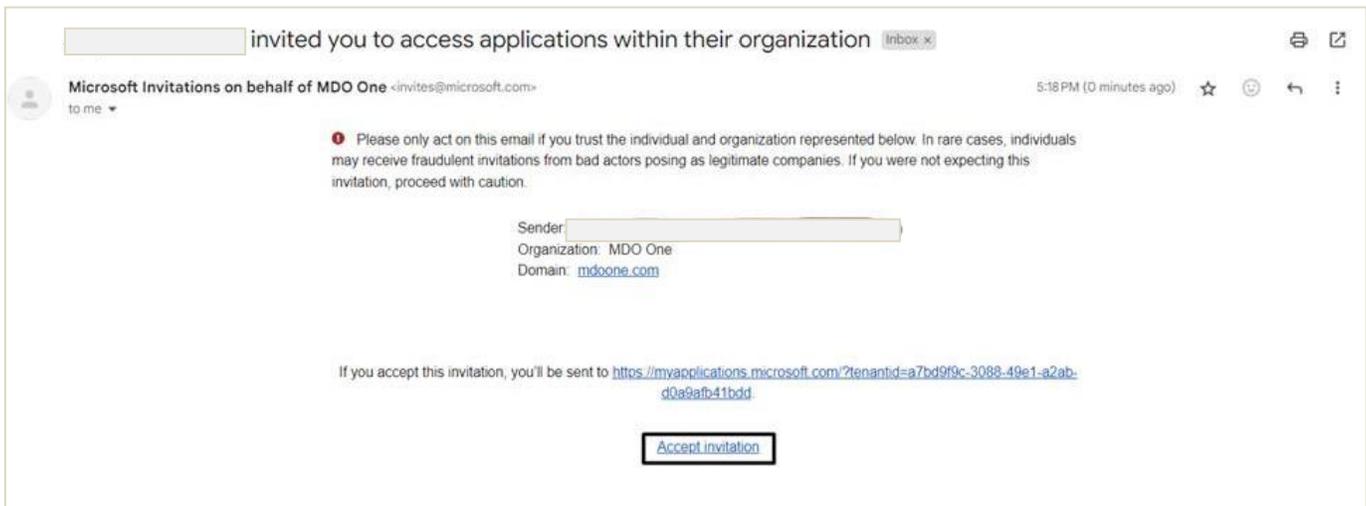
6. Click on the "Accept" button.
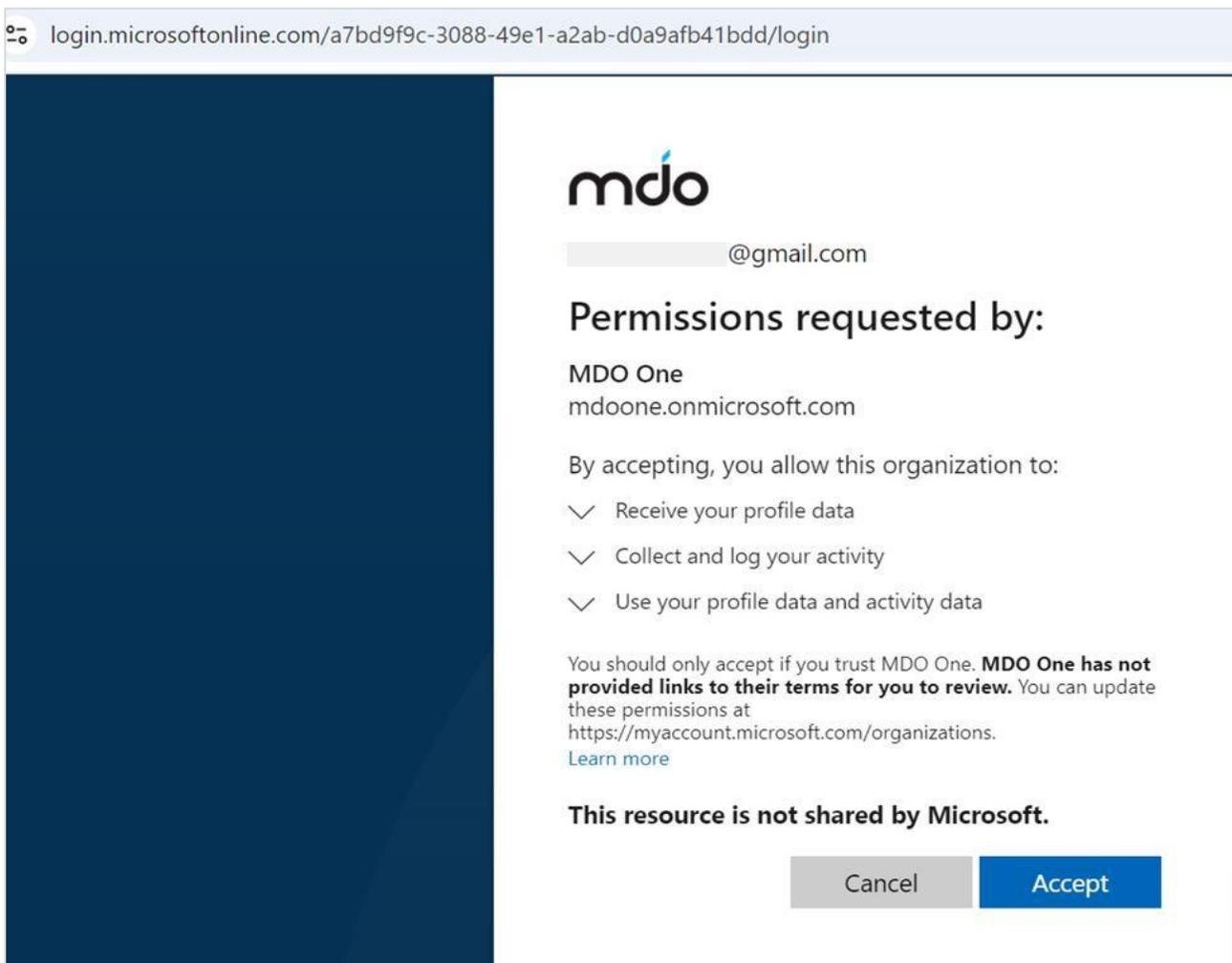
7. Click on "next" to set up MFA authentication to secure your login. This is a mandatory field to complete.
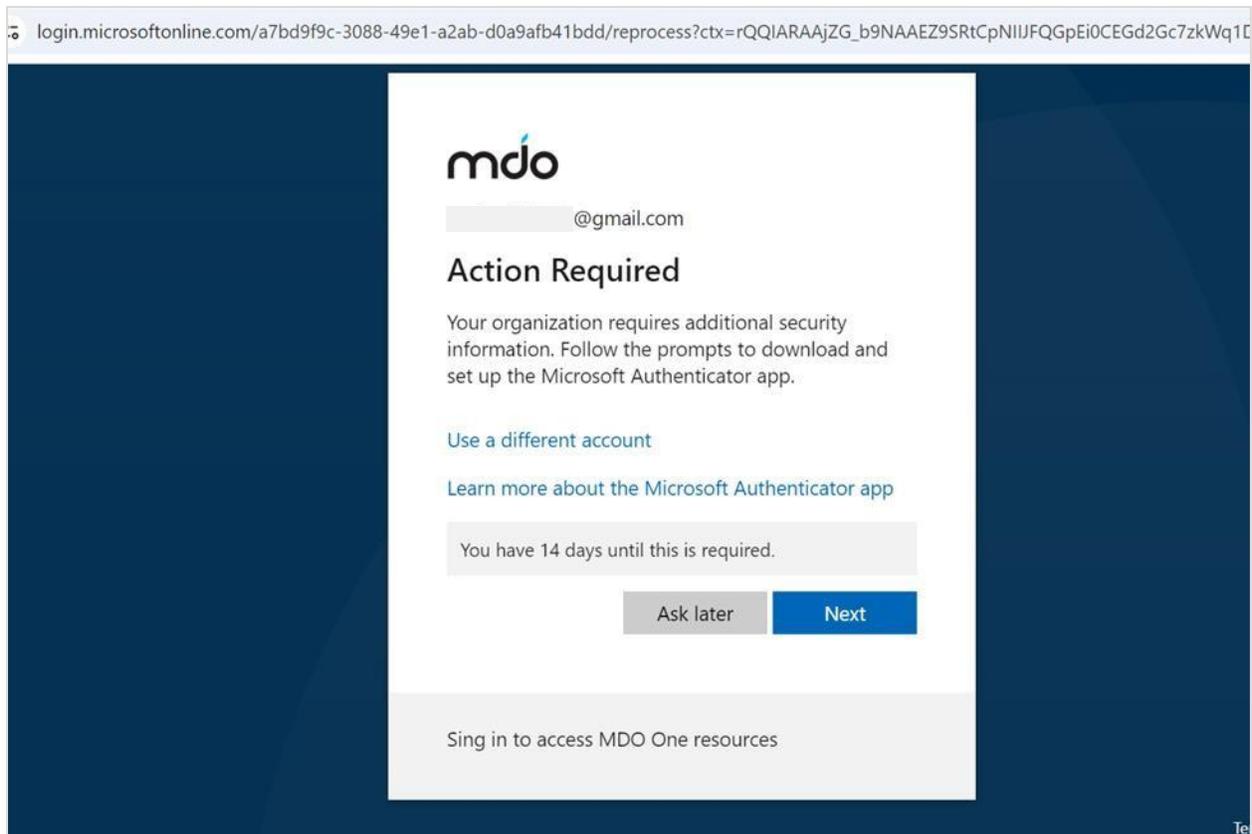
8. Click on next.
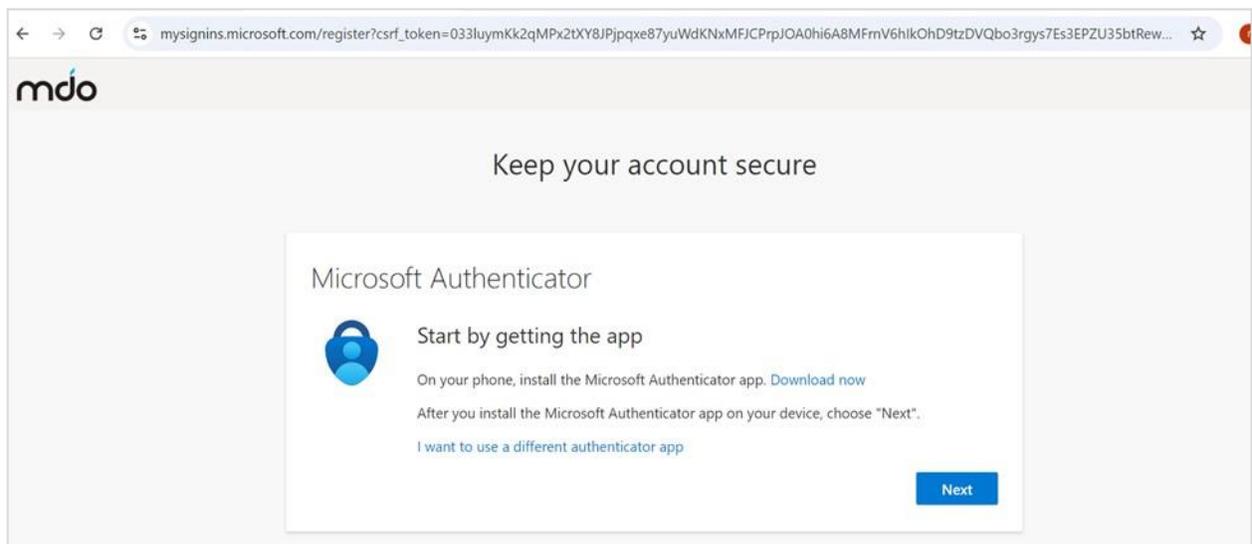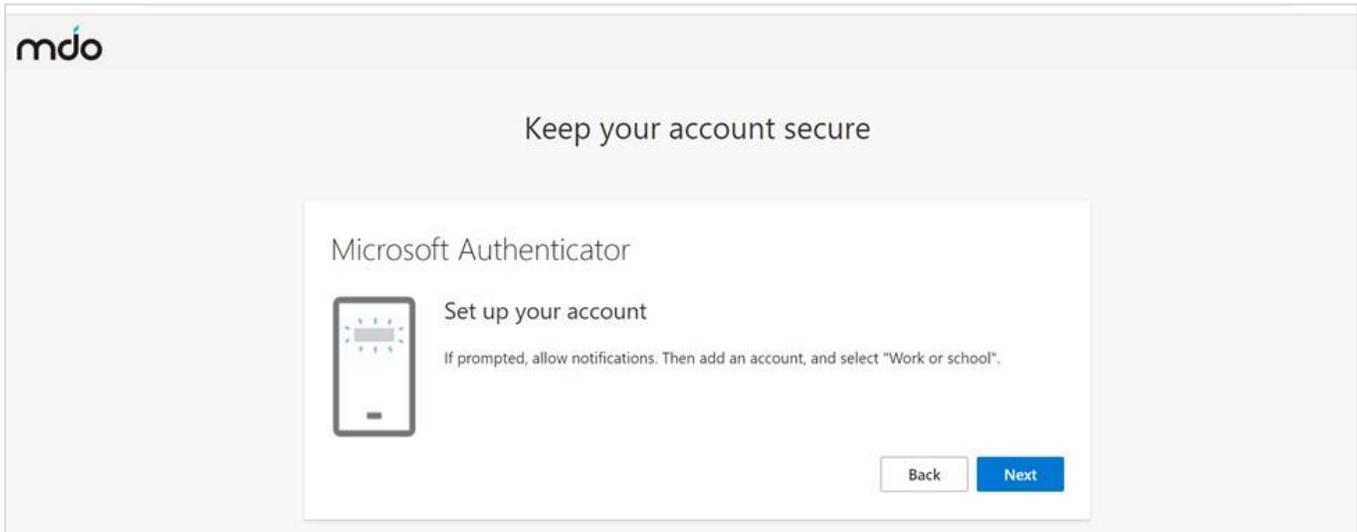
9. Please install the "Authenticator" application on your mobile and scan the code displayed on page to complete the set up. Then, Click "next".
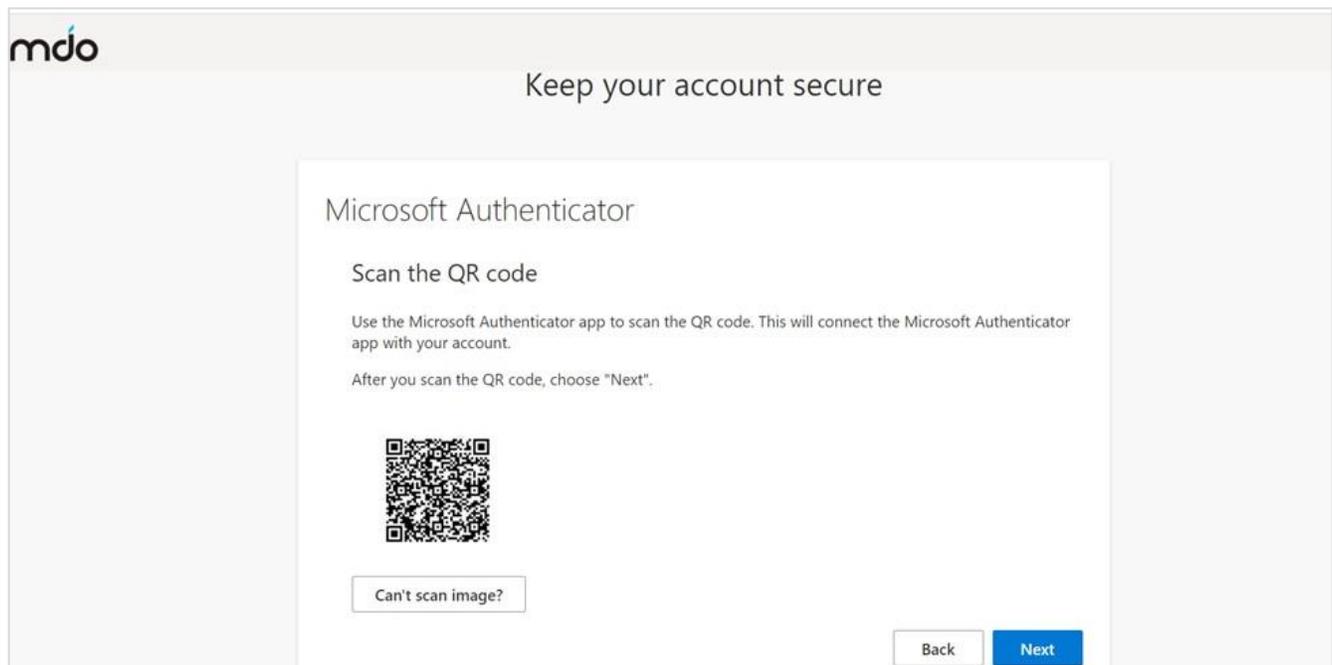
10. You will receive an email to approve the Microsoft authenticator set up.
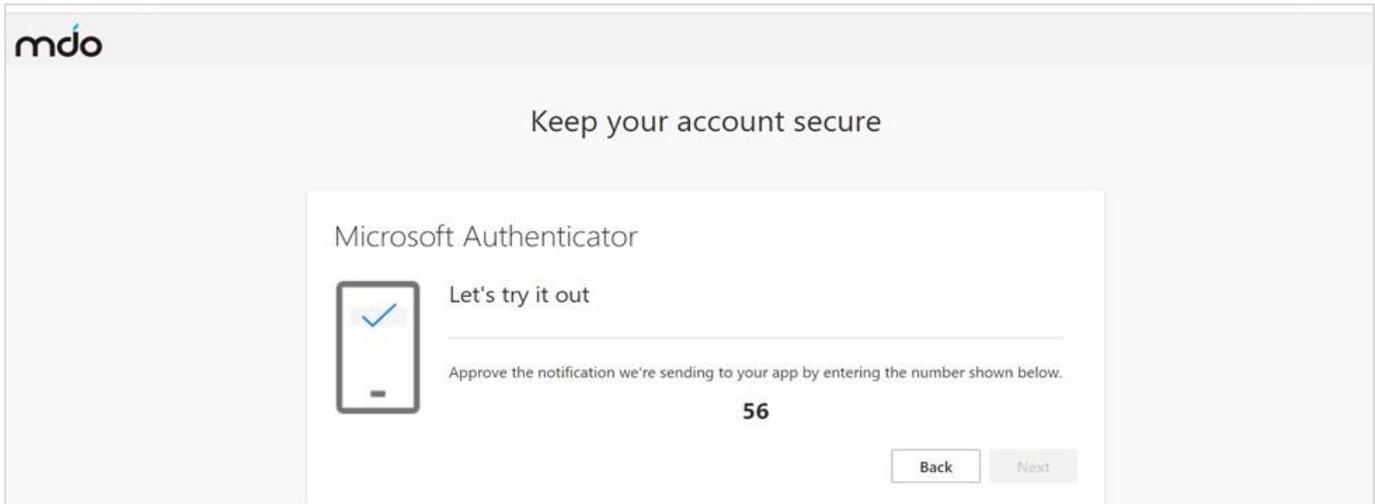
11. The next step will be displayed on the screen below which shows Notification approved.
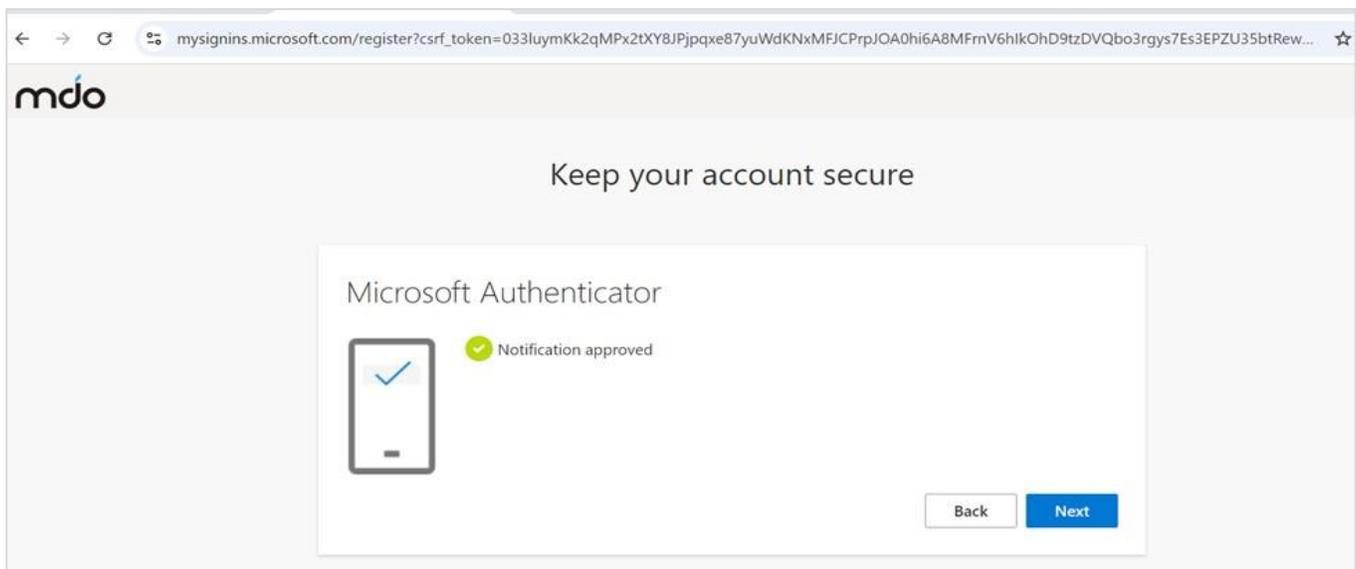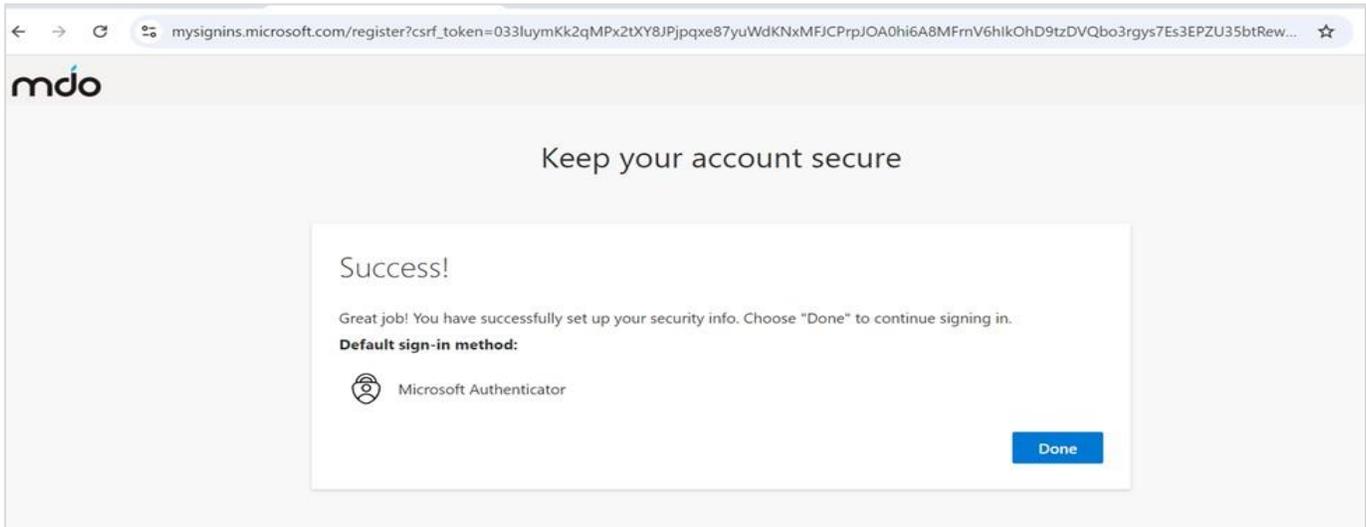
12. User will receive another email from Jira to accept the invite for organization on which user need access to raise the tickets.
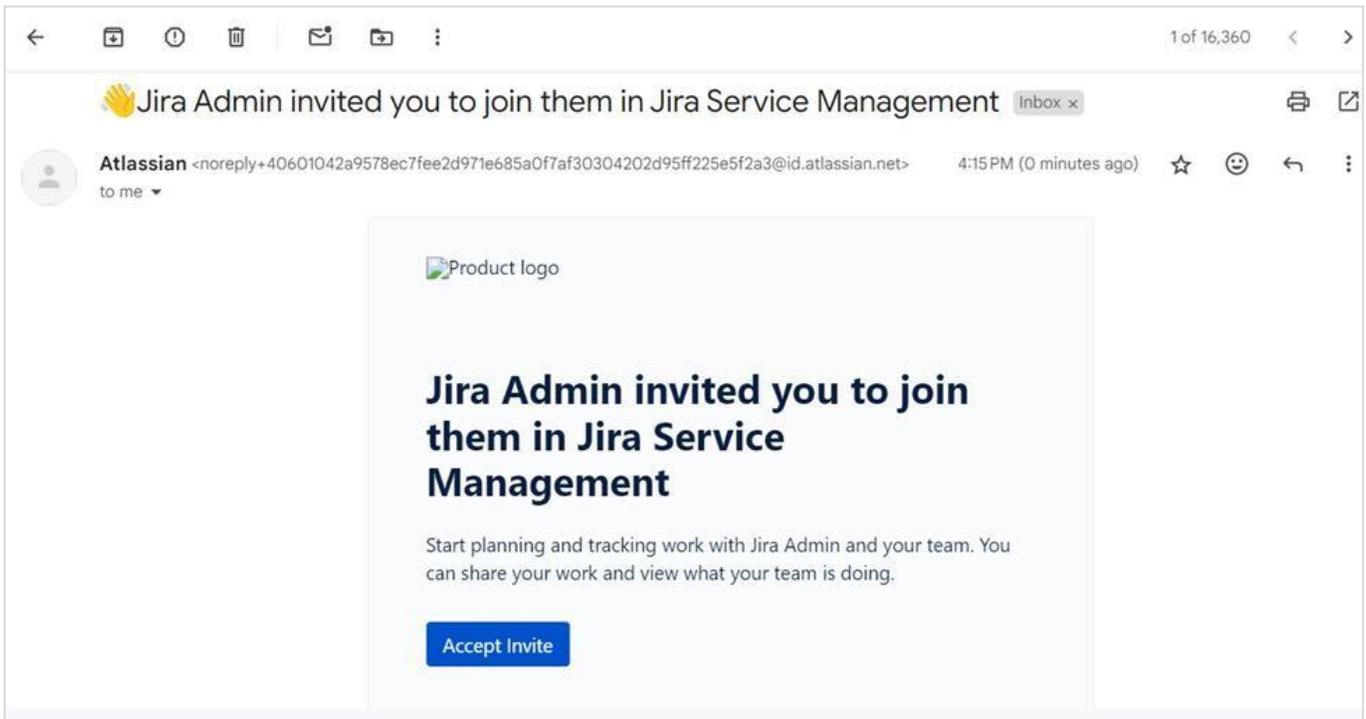
13. Please enter your username and password by selecting 'Continue with Microsoft.'
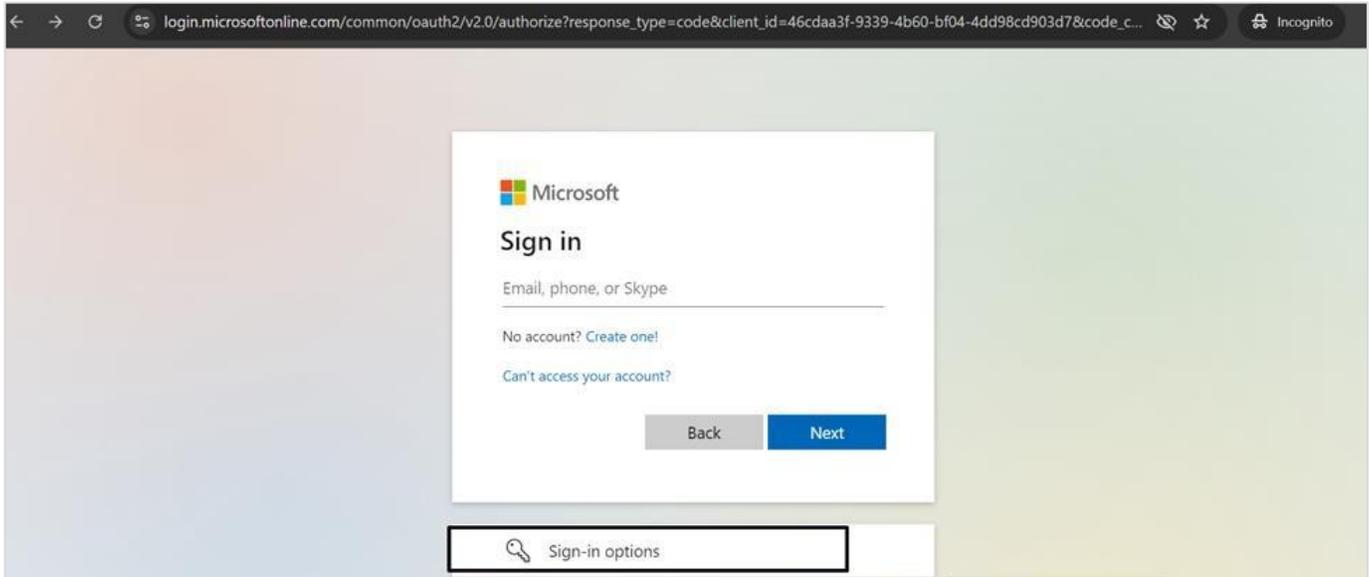
14. Follow the next step as shown in the screenshot below
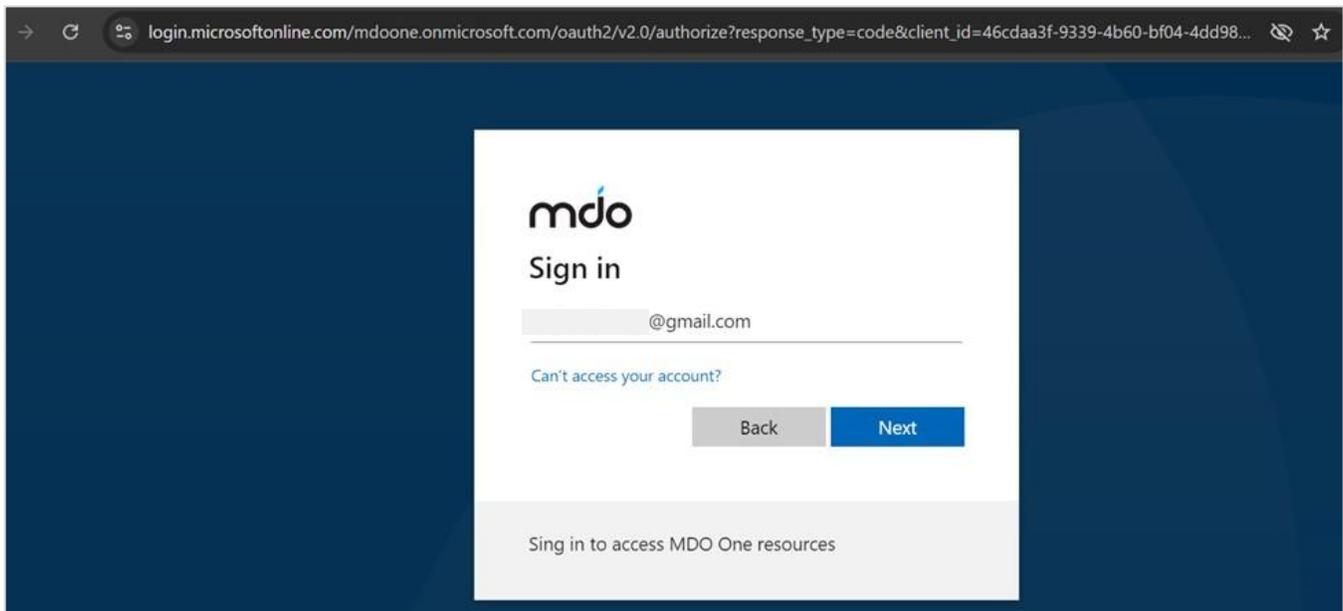
15. Click on the "Accept" button.
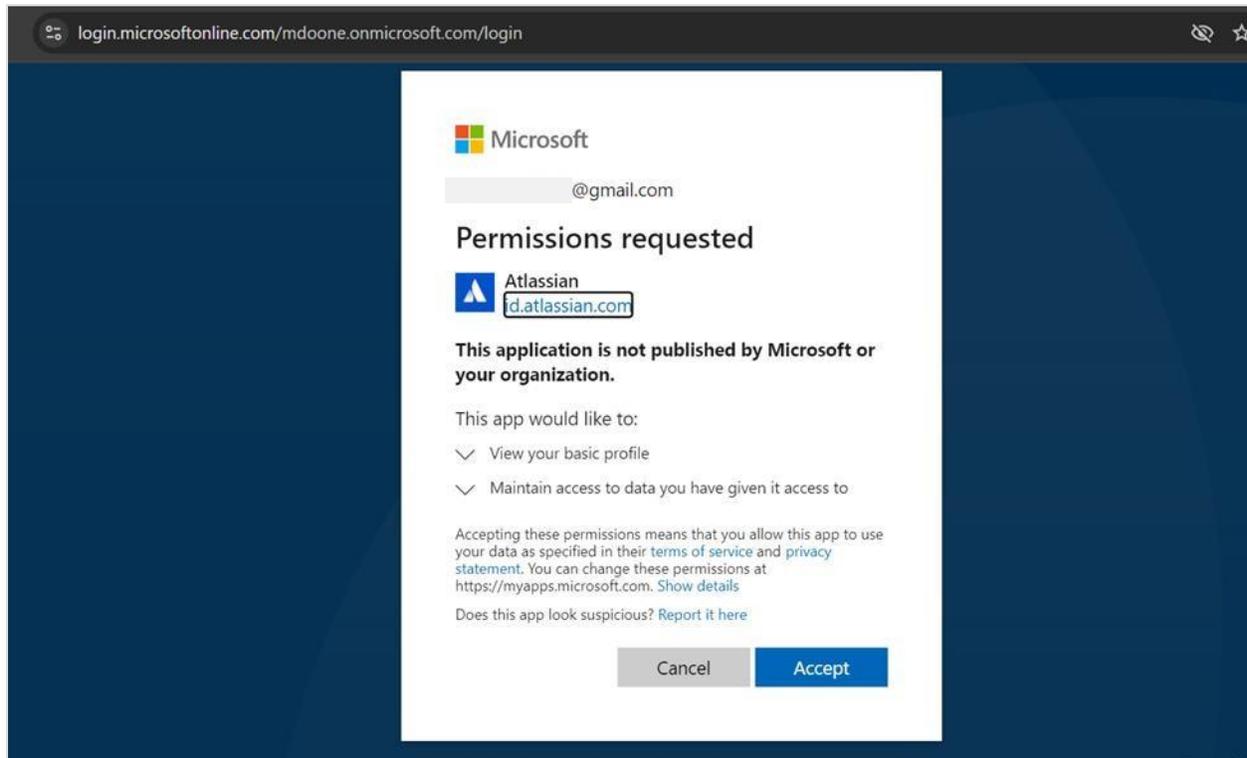
16. Enter the verification code which will be sent to your email address.
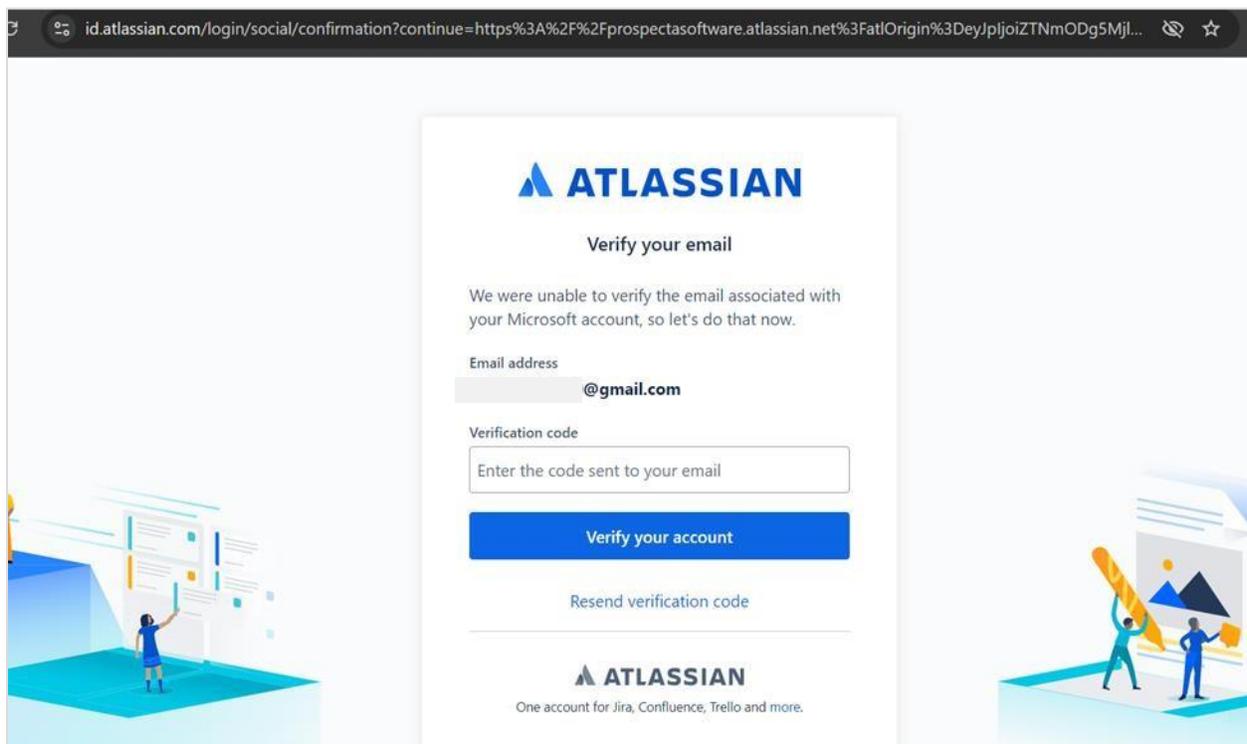
17. Once the user has logged in or signed up successfully, the screen below will be displayed.
Once the screen appears, the user needs to request Prospecta to add them to the organization.

18. Now user onboarding and MFA set-up has been completed and this page will be visible.
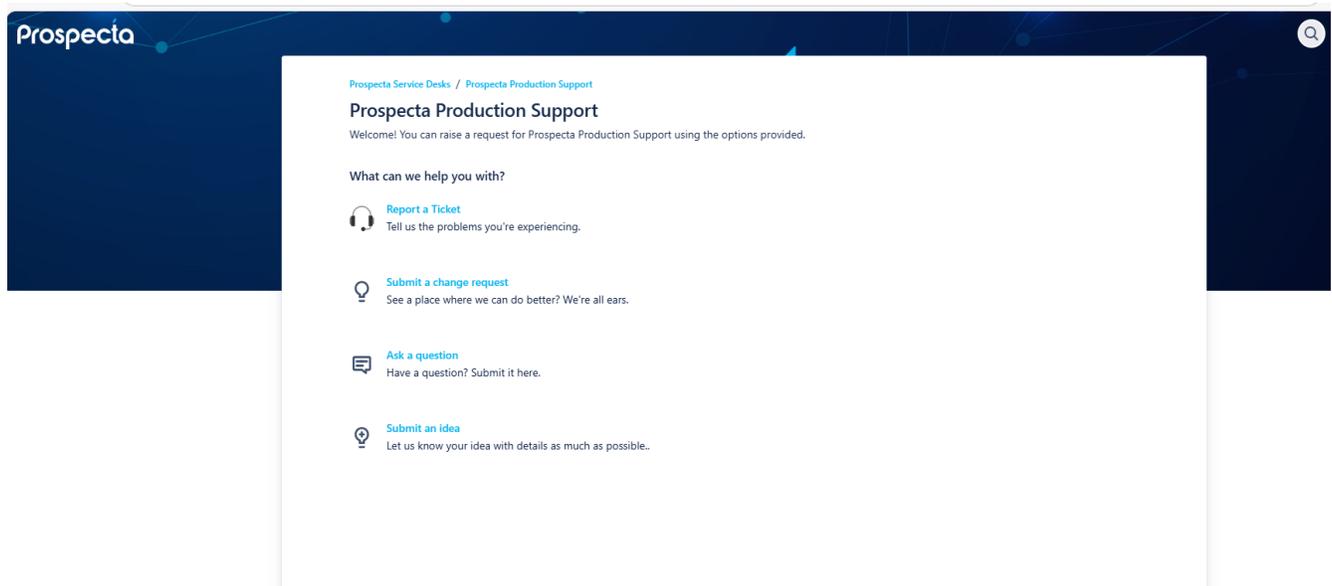
Based on the issue experienced, you may choose the support category from the screen displayed above. Find below details of each category

- **Report a Ticket:** This category is used to report an actual issue that results in an error within the platform or a malfunctioning feature. The defect could range from a minor error to something that severely impacts business-as-usual (BAU) operations. Defects require investigation and resolution by the support team to restore normal functionality. **"This ticket type will also be utilized to activate the new feature flag on the platform according to the customer's requirements."**

- **Submit a Change Request:** This category is used when a customer requests modifications to existing functionality, including configuration changes or DAXE-level adjustments. It may also cover entirely new requirements that the customer is sharing for the first time.

- **Ask a Question:** This category is used when the customer needs clarification, has a query, or is confused about a particular functionality or issue. It typically refers to a situation where the customer seeks an answer or guidance that doesn't require extensive investigation or troubleshooting.

- **Submit an Idea:** This category is used when a customer propose entirely new concepts, requirements, features or functionalities that the platform might not have considered. The new idea could significantly improve the platform or introduce a new way of doing things.

NOTE: Any change request will require additional details to be documented in a Change Request form, which will be provided by your designated Client Partner. This document should include all necessary information, including logic, scenarios, and expected outcomes from the client. Once the Prospecta team receives this information, they will evaluate the feasibility of the request, provide cost estimates, and communicate the expected delivery date or timeframe for the changes.

How to Log a Ticket for Bug and New Feature Flag?

To report a defect or platform issue, please click on "**Report a Ticket**" and fill the requested details:

- In the "share with" field, enter the organization's name to indicate for whom you are raising the ticket.

- The link below will help the user understand each field in detail:

  [What You Need to Know to Raise a Ticket](#)

Issue Categorization

Please note that the issue's priority will be determined based on the selected ticket category, as outlined below.

Ticket Categorization	Environment	Ticket Priority
Users are experiencing issues with submitting or approving requests	Production	Highest (P1)
	Non-Production	High(P2)
Integration issues with records are causing inconsistencies	Production	Highest (P1)
	Non-Production	High (P2)
Users are encountering difficulties accessing the application	Production	Highest (P1)
	Non-Production	High (P2)
Concerns related to dashboards, audits, and process logs	Production	High (P2)
	Non-Production	Medium(P3)
Setup-related issue affecting project milestones	NA	High (P2)
Significant performance degradation affecting multiple users and processes	NA	High (P2)
Issues related to the usability of the feature	NA	Low (P4)
Any other issues	NA	Medium(P3)

If your issue does not fall under any of the categories, please select 'Any other issues' and explain the impact by commenting on the ticket, so we can adjust the ticket priority accordingly.

Ticket SLA's

Target Resolution Times

| Priority Level	Response Time	Target Resolution Time
Highest (P1)	30 minutes	48 hours
High (P2)	60 mins	2 weeks
Medium (P3)	4 hours	4 weeks
Low (P4)	8 hours	6 weeks

Once the ticket is submitted, you can view all the tickets raised by the user under 'Requests' in the profile tab.
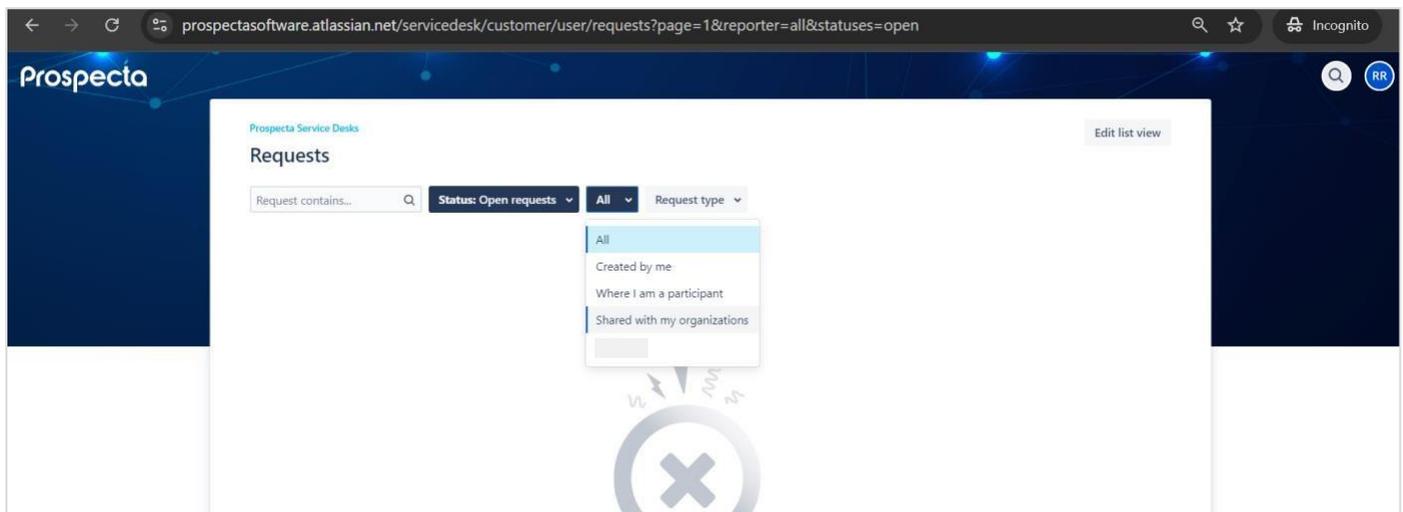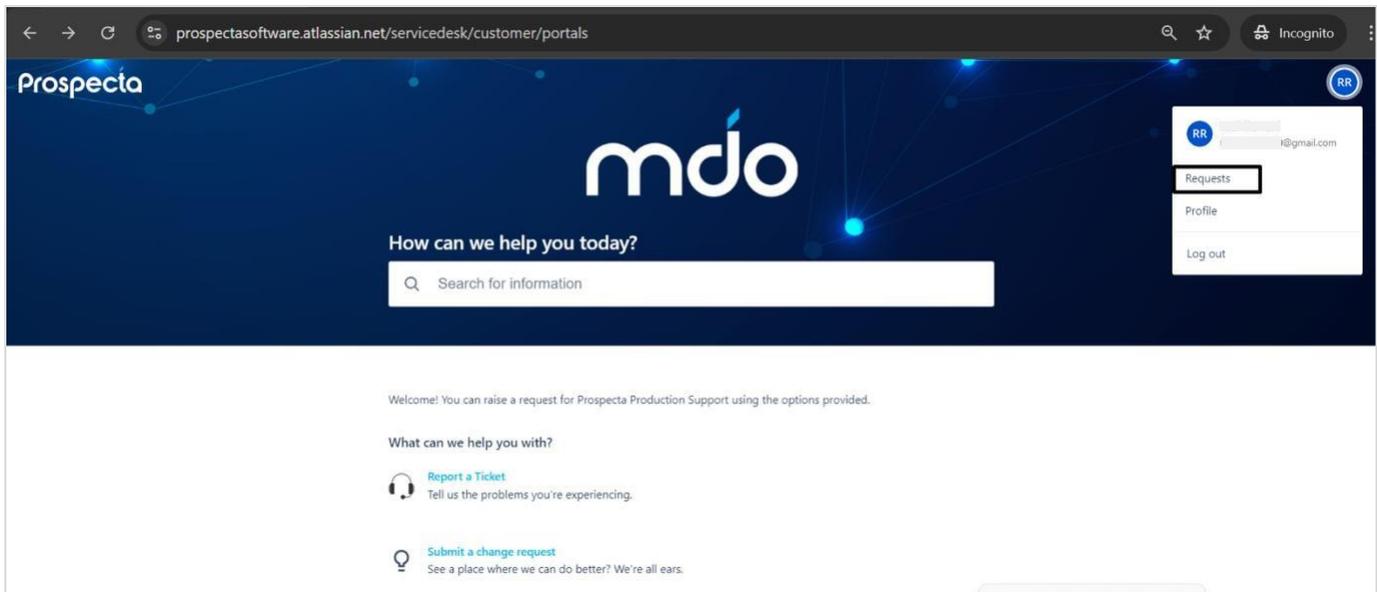
- ▪ **Search Option** – Users can search their tickets by ticket ID under the search option.
- ▪ **Status** – By clicking on the status option, users can see whether the ticket is
    Open
    In progress
    Waiting for your response
    Resolved
    Reopened.

- **All** - Under the "all" option, user can see all the below tickets.
  - **Created by me:** Users can view the tickets they have created.
  - **Where I am a participant:** Users will be able to see the tickets in which they have been added as CC by the ticket reporter
  - **Shared with my organization:** Users will be able to view all tickets raised by members within the same organization.

- **Request Type** – User can filter tickets as Questions, Change request or a ticket with defect.
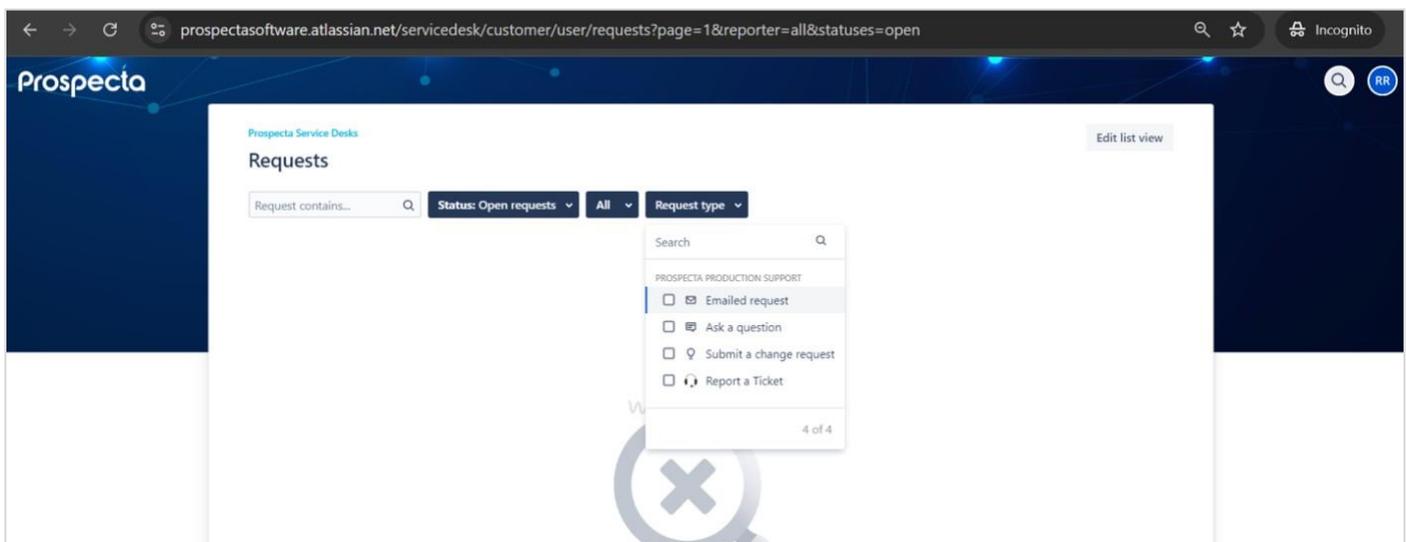
Workflow of a Ticket

- Whenever a ticket is logged in, the ticket status will be "**Open**".
- Once the ticket is picked and assigned to a support executive, ticket status will change to "**Acknowledged**".
- The next status is **"In Progress"** Under this status, a ticket can go through several phases, including investigation of the issue, and, after investigation, the technical team will begin working on fixing or resolving the problem
- If more details are needed from the user or if testing is required on the user's end after changes have been made by the technical team, the ticket status will be **"Waiting for YourResponse"**.
- Once the issue has been resolved, ticket status will change to "**Resolved**".

Knowledge Base

When users are raising a ticket with support, they can search for troubleshooting articles related to their issue under '**Provide a Brief Summary of the Ticket**' and from the main page '**How can we help you today**'.

For reference, please see the example below:
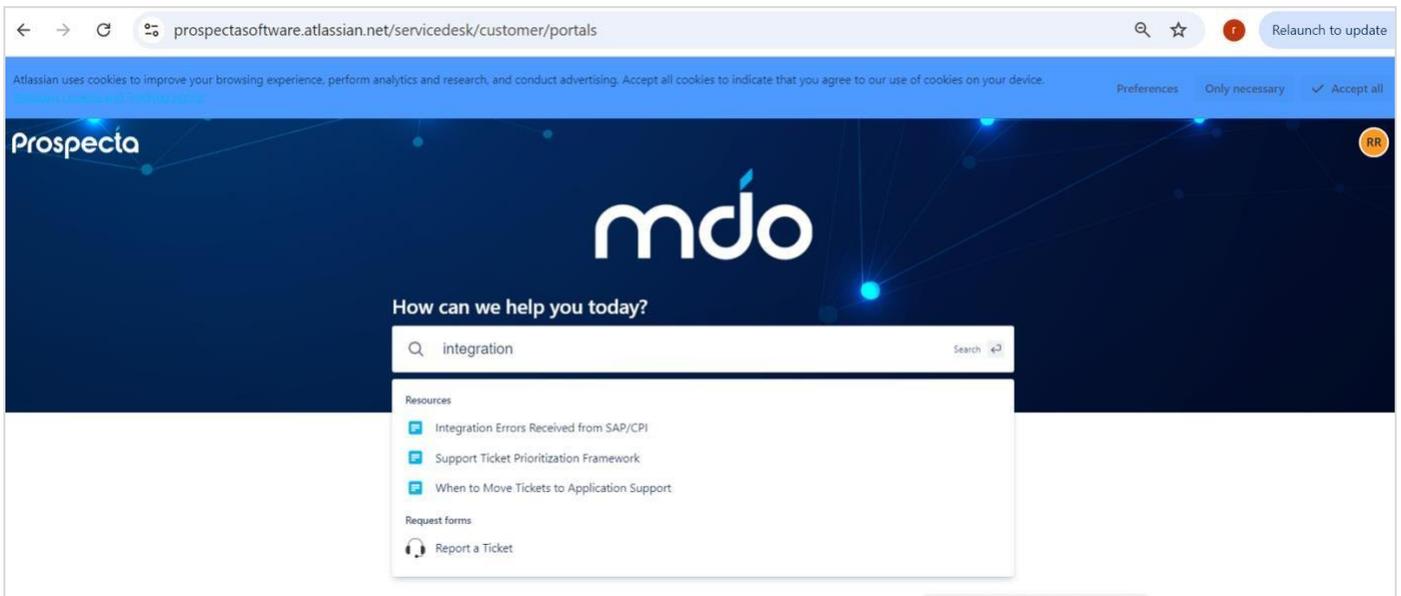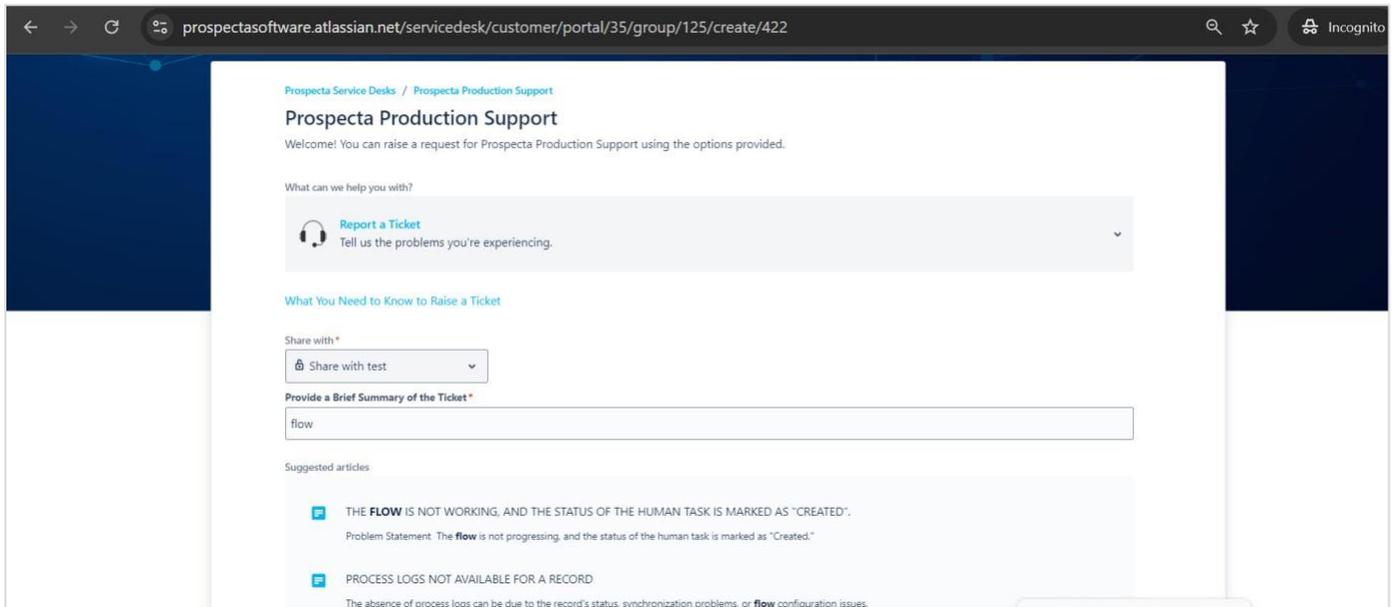
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