Qdabra Customer Support Portal

– Quick Start Guide

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✋ *This manual is designed to be a comprehensive guide for users new to the Qdabra Support Portal.*

Welcome to the Qdabra Customer Support Portal

The Qdabra Customer Support Portal is a web-based tool that offers a range of functionalities designed to enhance client experience with our services and support. Whether you are here to manage your support requests, check your balance sheet, verify your license, or track your FormsViewer usage, this manual will provide the necessary information to navigate and utilize the portal effectively.

Purpose of This Document

The primary aim of this manual is to assist you in quickly becoming familiar with the portal's features and capabilities. Serving as a step-by-step guide, it will help you understand how to:

- **Authenticate and access the portal.**
- **Create and check support tickets.**
- **View your balance sheet.**
- **Verify your current licenses.**
- **Monitor FormsViewer usage.**

Target Audience

This document is specifically intended for first-time users of the Qdabra Customer Support Portal who are clients of Qdabra Solutions or Product Support. It is designed to provide clear and straightforward guidance without assuming any prior knowledge of the portal.

Requirements

Before accessing the portal, ensure that the following system requirements:

- A stable internet connection.
- An updated web browser (e.g., Edge, Google Chrome, Safari).
- Smartphone with **Authentication App** (Microsoft Authenticator, or Google Authenticator)
- **Invitation from Qdabra** to add to your Authentication App.
  - Please contact Support@Qdabra.com via email to request the invitation.
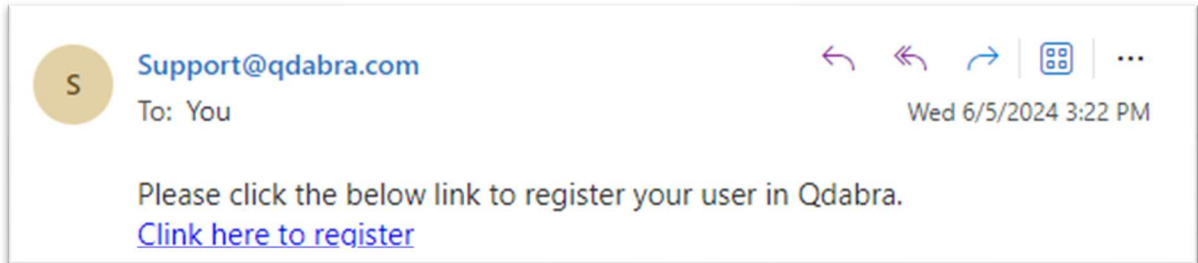
Authenticator Setup

Steps:

1. Install authenticator App (Any authenticator should work, but we've tested Microsoft Authentication, or Google Authentication) if not yet installed.
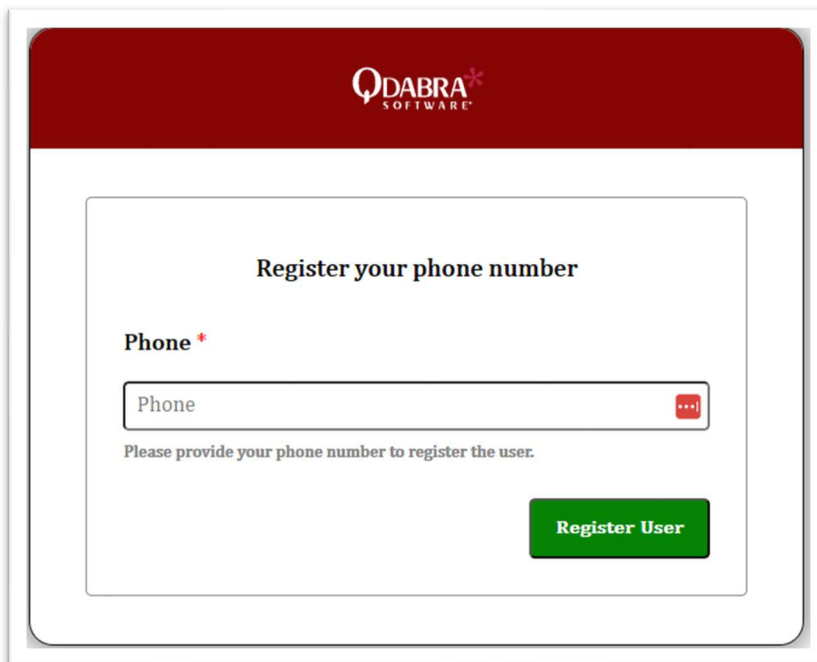2. Contact Qdabra Support, and get the invitation email to your company email address.
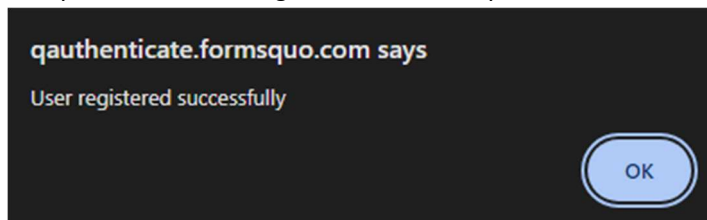
- o Please check junk folder too.
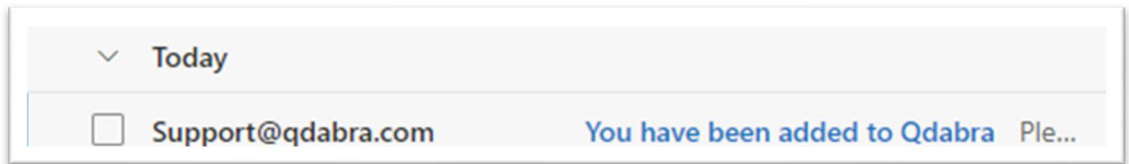
3. Open the invitation email, and click "Click here to register"

4. Follow the direction. It should ask your Phone Number. Type in the number and click **Register User**.

5. Then you will see User Registered Successfully.

6. Then you will see the QR code

7. With your cellphone, open your authenticator and scan this QR code to add.
   o   For Microsoft Authenticator, select "Others" among {Personal, Company/School. Others}
8. Then you will see "Qdabra" added to the authenticator.

LOG IN AND AUTHENTICATION

✋ *To access the Qdabra Customer Support Portal, users must have Authenticator App on their phone, and have added Qdabra, as described in the previous section. If you have any questions, please contact Support@qdabra.com.*

Accessing the Portal

To access the Customer Support Portal, please follow these steps:

- Visit the Qdabra.com website at https://www.qdabra.com/
- Navigate to the **Customer Support Portal**, which can be found under the **Support** menu
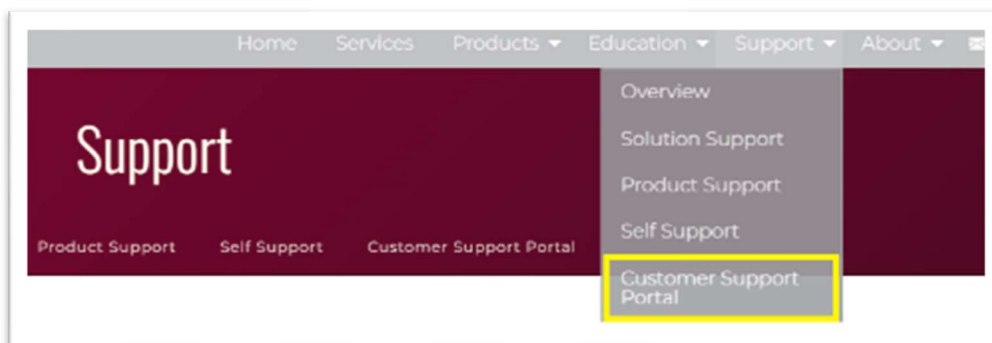
The current url of the page is https://www.qdabra.com/en/support/customerSupportPortal.aspx

- You will be presented with a screen similar to this:
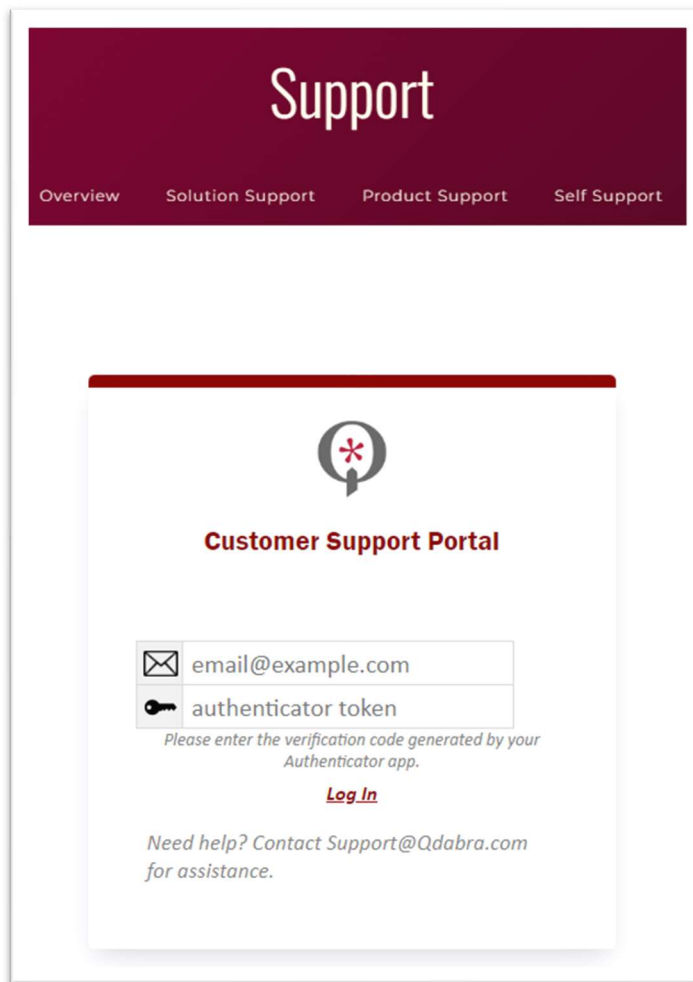
- Enter your email address, and token from the Authenticator App.

SUPPORT TICKET DASHBOARD

The Support Ticket Dashboard is a central feature of our Customer Support Portal. It allows you to effectively manage your interactions with our support team.

Features:

1. Viewing the list of Support Tickets on your company.
2. Checking the Status of Existing Support Tickets.
3. Creating a New Support Ticket.

Viewing the list of Support Tickets

Navigate to the Support Ticket Dashboard by clicking **Support Ticket** tab. Here, you will find a comprehensive list of all your company's support tickets.

- You can filter by Status or Assignee
- You can sort by ID, Created Date, or Last Modified Data

Checking the Status of Existing Support Tickets

- To check the status of existing support tickets, click the arrow button in the Link column of your target ticket.
- This opens a new tab with details of the ticket, including the history of updates.

Creating a New Support Ticket

Click the "**Create New Ticket**" button within the Support Ticket Dashboard to start the ticket creation process. This guides you through each step to capture all necessary information accurately.

Utilizing the AI-Supported Chat Bot

1. Engaging with the Chat Bot:
   o Upon clicking "Create New Ticket", you will be introduced to our beta AI-supported Chat Bot.
   o The bot streamlines ticket creation by asking a series of questions.
2. Interacting with the Bot:
   o Engage with the chat by answering the bot's questions, covering various aspects of your issue.
   o Your responses help the bot understand the nature of your support need.
3. Bot Assistance in Ticket Creation:
   o Based on your responses, the Chat Bot will assist in formulating your support ticket.
   o It ensures that all relevant information is included.

Reviewing and Submitting the Ticket
After your interaction with the Chat Bot:

1. Review the Drafted Ticket:
   o The Chat Bot presents a draft of your support ticket for your review.
   o Ensure that all the details and descriptions of your issue are correct and complete.
2. Submit the Ticket:
   o Confirm the details and submit the ticket.
   o Receive confirmation with a unique ticket number for reference and future correspondence.

Checking the Knowledge Base

1. Automatic Search for Similar Cases:
   o The Chat Bot looks up our knowledge base in real-time while you interact.
   o The goal is to find similar cases or existing solutions that can promptly address your issue.
2. Reviewing Suggested Solutions:
   o If relevant articles or resolved tickets similar to your case are found, the bot presents these to you.
   o Review these suggestions for potential solutions or insights.

BALANCE SHEET DASHBOARD

✋ *You may not have the Balance Sheet tab. The Balance Sheet tab in the Customer Support Portal is specifically available to users who are listed as recipients of each Balance Sheet.*

Number ↕	Date ↕	Project		Balance ↕	Last Modified ↕
23110102	2023 11 01		Standard Support thru 2024 09 30	$ 166	2023 11 01
22092601	2022-09-26	Support thru 2023-09-30		$0	2023-11-01

Accessing the Balance Sheet

- Click on the 'Balance Sheet' tab located in the main navigation menu of the Customer Support Portal.
- If you do not have the 'Balance Sheet' tab in your portal, it may be because you are not designated as a recipient.
- If you believe you should have access to the Balance Sheet but do not see the tab, please contact Support@qdabra.com for assistance.

Features of Balance Sheet Dashboard

Once you access the Balance Sheet section:

1. Viewing the List of Balance Sheets:
   - The dashboard displays a list of balance sheets associated with your account.
   - Each entry includes the type of balance sheet and its current balance.
2. Accessing Detailed Information:
   - For more details on a specific balance sheet, click on the hyperlink associated with each entry.
   - This action opens a detailed view, providing in-depth information about that particular balance sheet.

LICENSE DASHBOARD

To view and manage your company's licenses, navigate to the License Dashboard by clicking on the 'License' tab in the Customer Support Portal.

Company	License	Type	Note	Expiration Date	Paid
	FormsViewer	Enterprise	Product - FormsViewer;Product - FormsViewer Subscriptions	2024 09 30	Paid
	Support	Standard	Software Consulting;Support Plans	2024-09-30	Paid

Overview of License Types

In the License Dashboard, you will find a comprehensive list of licenses associated with your company:

- Product or Solution Support
- FormsViewer Subscription
- DBXL License

Details Provided for Each License

Each license entry on the dashboard will provide the following information:

- The specific license and its type.
- The expiration date of the license.

FORMSVIEWER USAGE REPORT

✋ *Please note that the Usage Report exclusively displays data for the online version of FormsViewer. Usage data for the On-Prem (On-Premises) version is not included in this report.*

Navigate to the FormsViewer Usage Report by clicking **Usage** tab. Here, you will find the monthly usage of FormsViewer within your company for monitoring and managing.

Report Contents

The FormsViewer Usage Report includes several key metrics and visualizations:

- Monthly usage chart
- Last month usage
- License Level, and allowed open per month
- Usage percentage