



User Guide

GoCo's Customer Care Portal



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1

Introduction

GoCo's CSM Portal is here to provide you with information and support.

Through this portal you will be able to accomplish the following:

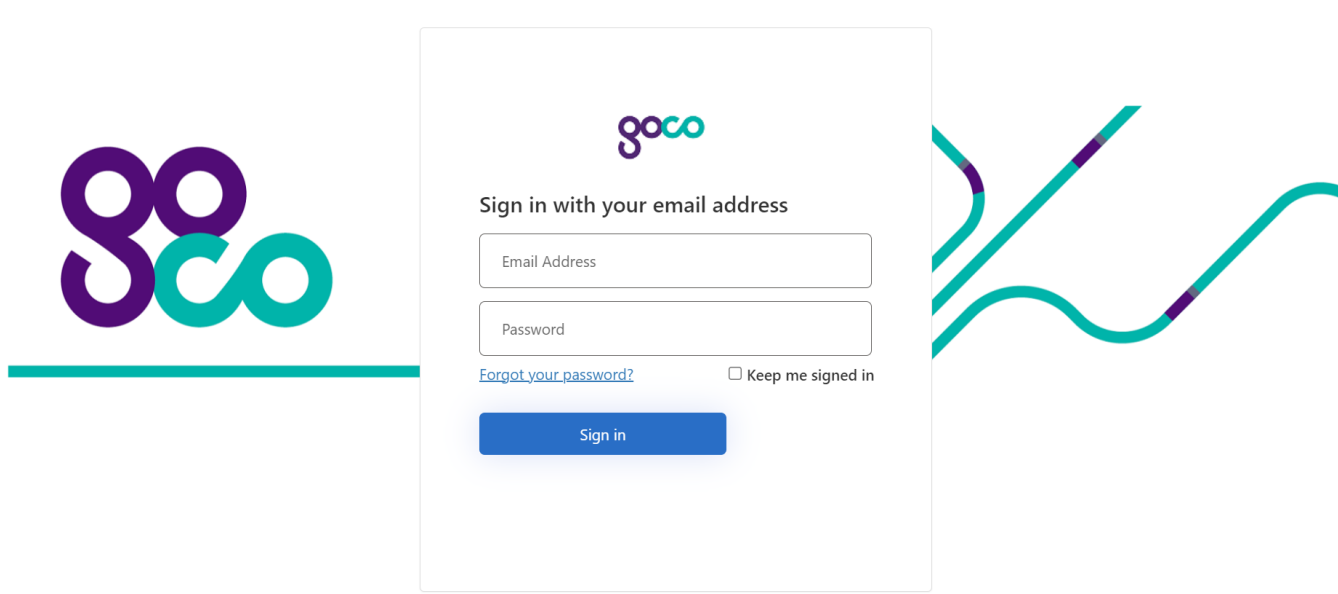
- Submit issues, change requests and inquiries.
- Track your submitted cases and exchange information with GoCo's support team.
- Manage your organization account contacts.
- And much more!

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Access

a. First Time Portal Users

In order to connect to our customer care portal, you will receive an email with your login details after your first support request on launch date. If not, please contact your account manager or visit <https://www.goco.ca/support/> and submit a request.

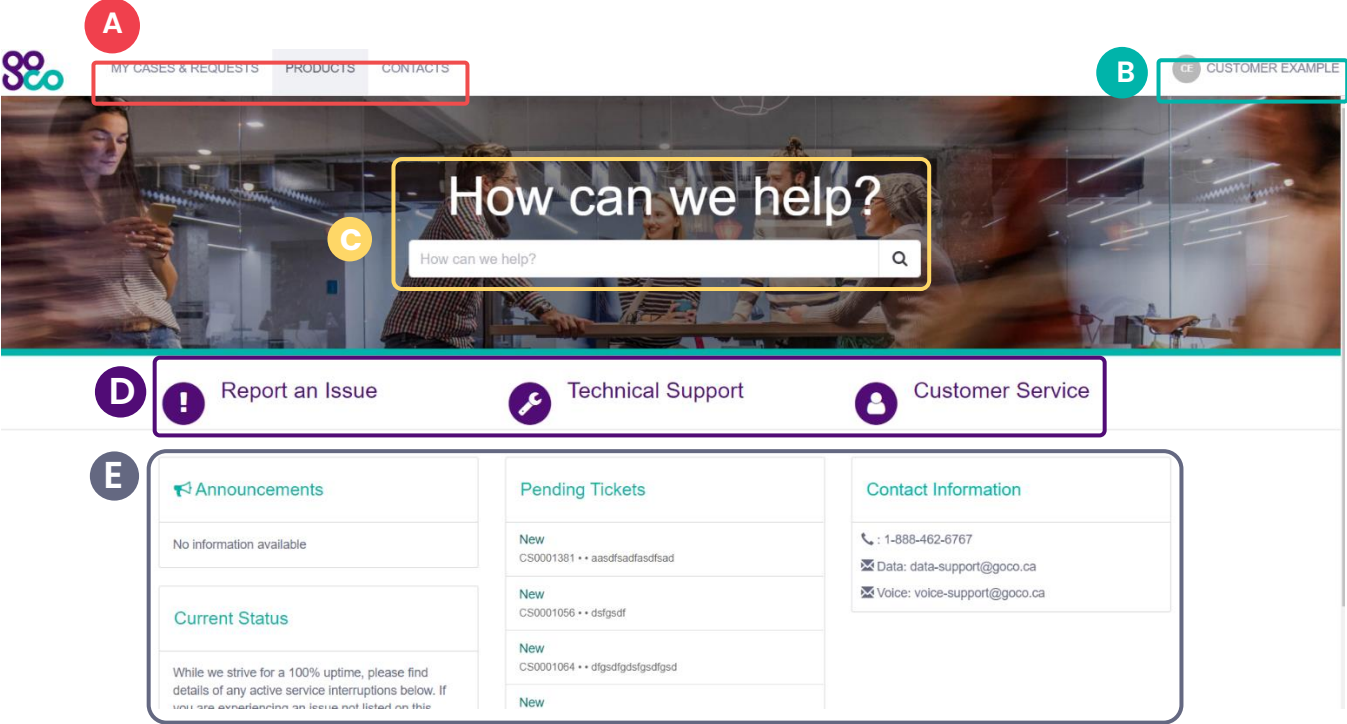


b. Existing Portal Users

For existing portal users, (i.e. Radiant Platinum, IS Customers), our existing self-care portals will remain. Once logged into these portals, you will have the ability to click on “Tickets” which will redirect you into the new Customer Care Portal. During your first login attempt, you will be prompted to reset your password to synchronize the portals. If you run into any issues, please contact your account manager or visit <https://www.goco.ca/support/> and submit a request.


3

Homepage



a. Main Menu

The Main Menu presents a list of shortcuts always available whatever page you are on.

Element	Description
	Clicking the GoCo logo displays to the homepage in the content frame
My Cases & Requests	This menu contains all active and historical cases that were open under your accounts.
Products	This menu contains all products under your accounts.
User Admin	This menu will let you view and manage contacts under your accounts.

	Note : You might not see this menu based on the role you have under your account.
System Status	This menu contains the current status of GoCo's current service offerings.
Knowledge Base	This menu contains knowledge base content pertaining to GoCo products and services.

My Cases & Request page:

My Cases & Requests	≡ Cases
All Cases	🔍 All
Action Needed	
My Cases	
My Requests	
Open a New Case/Request	
Customer Service	
Technical Support	

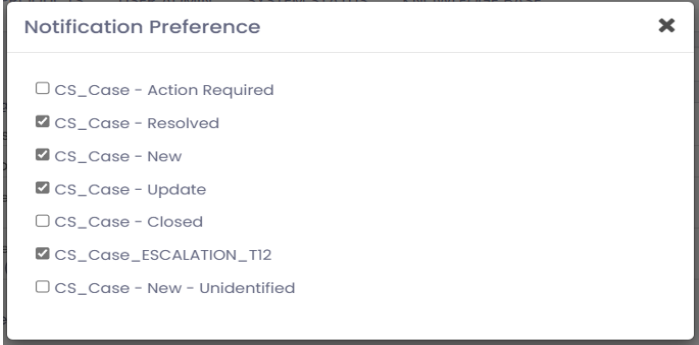
Number	Type	Short Description	Product	Contact	Account	Priority	State	Update
CS0001883	Change Request	Add/Remove Hunt Group	911 service	test criteris	Customer Account	4 - Low	New	2021-02:39:4 PM
CS0001912	Change Request	test	Co-Managed VPN	test1 test1	TEST ACCOUNT	1 - Critical	New	2021-01:28:3
CS0001886	Issue	Call Completion - Cable	Cable	test criteris	Customer Account	3 - Moderate	New	2021-01:11:10

Element	Description
All Cases	Tickets opened for you.
Action Needed	All tickets where an action is required from you before going forward in the resolution of the case. You will find what we are waiting from you by clicking on each case.
My Cases	Tickets opened as a case.
My Requests	Tickets opened as a request.

b. Settings

This section of the banner gives you access to all your profile settings.

If you click on your name, two options will appear:

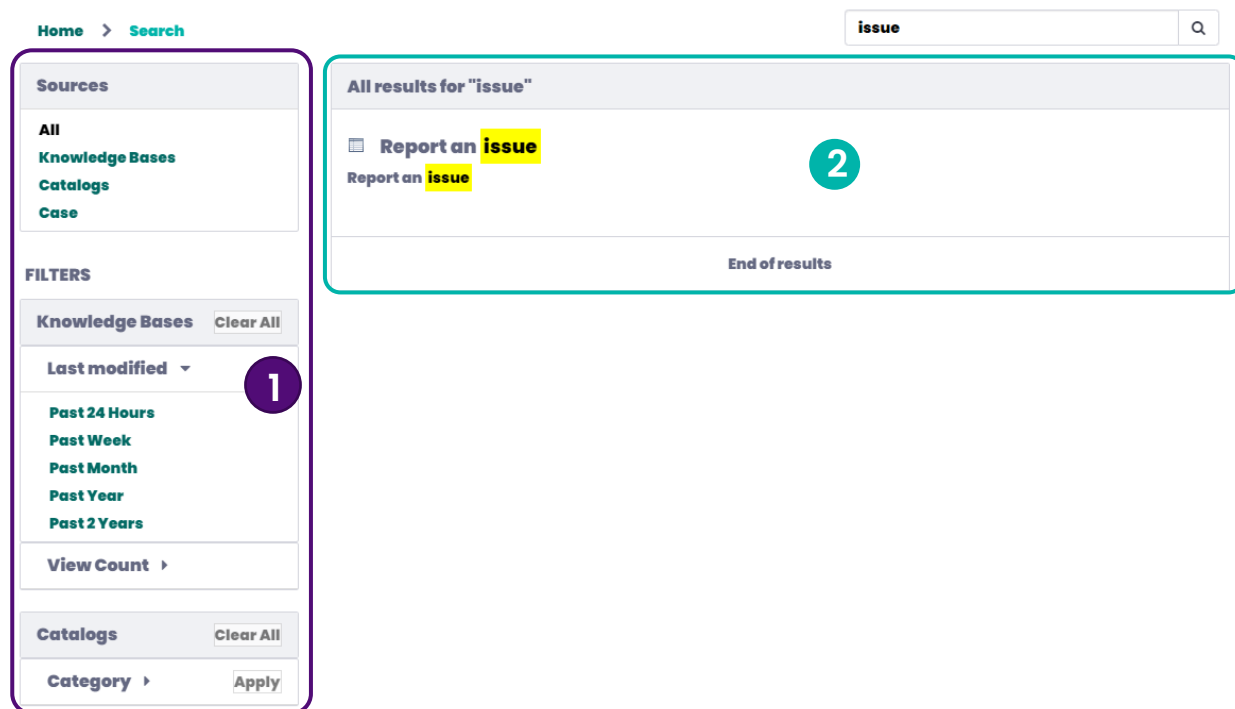
Element	Description
Profile	<p>Access to all the settings. You will be able to change:</p> <p>About</p> <ul style="list-style-type: none">• Your picture• Title• Bio• Email• Phone <p>User Preferences</p> <ul style="list-style-type: none">• Enable accessibility feature• Change the language <p>Actions</p> <ul style="list-style-type: none">• Notification Preferences – Subscribe/Unsubscribe to case notifications you want to receive by email 
Logout	<p>This button will logout your account. You will need to retype your password in order to log back into the platform.</p>

c. Global Search





The global search functionality gives you the opportunity to search through:

- The catalogue to open a new ticket
- The cases to see all your opened tickets

The choice you make on the sources and filter menu (#1) will affect the content you see (#2).



d. Shortcuts

Element	Description
 Report an Issue	Open an issue for one of your products or services.
 Technical Support	Access all the technical services available to you.
 Customer Service	Access all the business services available to you.
 Knowledge Base	Access all the knowledge base articles available to you.

e. Information

This section of the page shows all important information in one single place.

Element	Description
Current Status	We constantly monitor our services and their related components. If there is ever a service interruption, a notification will be posted to this page. If you are experiencing problems not listed on this page, you can submit a request for support.
Pending Customer Cases	All active cases. You can click on any one of them in order to see the last status.
Contact Information	The list of all the ways where you can contact us.

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Advance Role Functionality

a. Case Manager

Users with the case manager role can manage the cases in an account and any related child accounts. The customer case manager role includes the privileges of the customer role and adds the following privileges:

- View a list of cases belonging to the account.
- Edit cases belonging to the account.

b. Administrator

Users with the administrator role have access to all the data within the account. This user can also manage users for the customer accounts. They can update customer contacts, assign roles to contacts, enable or disable contact logins from the customer portal.

To manage contacts:

1. Click on **User Admin** in the main menu section



2. Select the contact you want to modify

Name	Account	Location	Email	Customer Admin	Business phone	Locked out	Updated
test testes	Dummy test sub account		fortest@foo.com	false		false	2022-04-02 10:23:56 AM
Test test 343	Dummy test sub account		test443@aja.com	false		false	2022-04-02 12:32:49 AM
Test test 34	Dummy test sub account		testfoo@bla.com	false		false	2022-06-10 04:01:28 PM

3. Use the contact form to update some information

A screenshot of the contact form for 'Test test 34'. The form is titled 'Contact' and has a purple circle with the number '3' next to it. The form fields are: *First name (Test), *Last name (test 34), *Email (testfoo@bla.com), Language (English), Time zone (System (Canada/Eastern)), *Account (Dummy test sub account), Location (empty), Email Notification (Enable), Customer Service Portal Access (checkbox), and Subscribe to monitoring cases notifications (checkbox). The form is enclosed in a red rectangular box. Below the form, there are 'Related Links' (Disable login) and a 'Save (Ctrl + s)' button.

4. Use the contact form to disable/enable the contact

Test test 34

Contact

*First name
Test

*Last name
test 34

*Email
testfoo@bla.com

Language
English

Time zone
System (Canada/Eastern)

*Account
Dummy test sub account

Location

Email Notification
Enable

☐ Customer Service Portal Access

☐ Subscribe to monitoring cases notifications

Related Links
Disable login

5. Use the contact form to edit the roles. To add "Dashboards & Reports" role, click on "Edit Roles" and drag-drop "sn_customerservice.portal_dashboards_reports" from **Available** to **Selected** and update the field

Test test 34

Contact

*First name
Test

*Last name
test 34

*Email
testfoo@bla.com

Language
English

Time zone
System (Canada/Eastern)

*Account
Dummy test sub account

Location

Email Notification
Enable

☐ Customer Service Portal Access

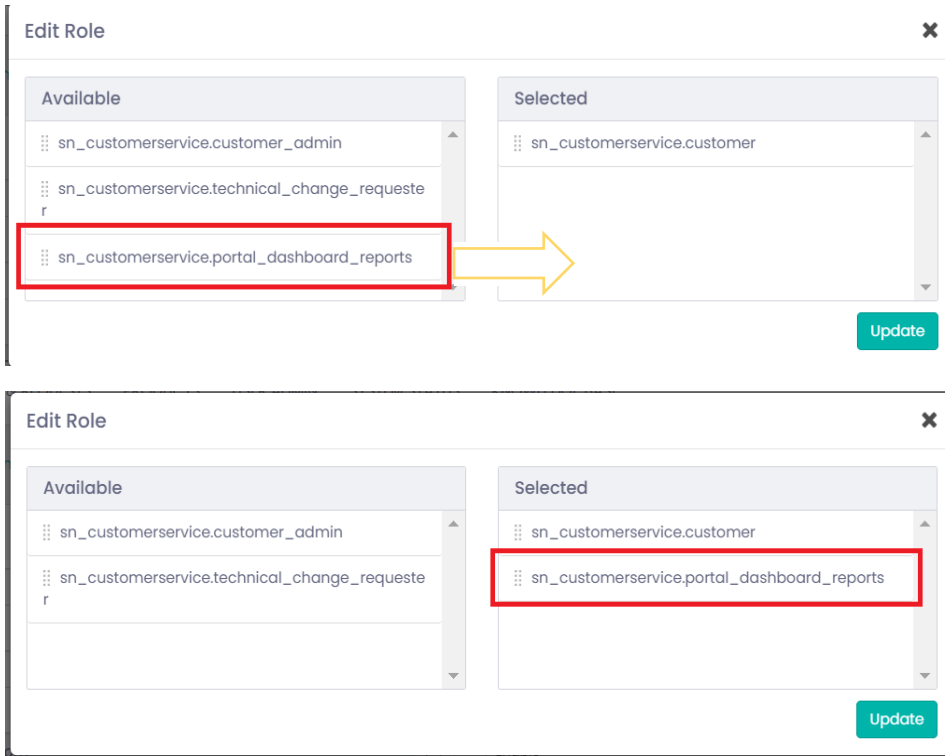
☐ Subscribe to monitoring cases notifications

Related Links
Disable login

Save (Ctrl + s)

Actions

Edit Roles



5

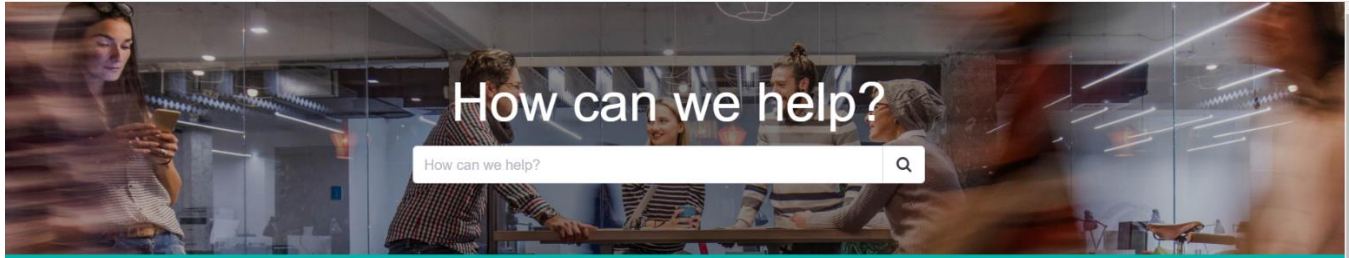
How to Open a Ticket

This section shows you a few examples of how you can ask GoCo something using the customer portal.

a. How to Report an Issue

If you have an issue that impacts one or more of your services, you can use GoCo's portal in order to open a ticket.

In the homepage, click on "Report an Issue" shortcut (see #1)



1

[Report an Issue](#)[Technical Support](#)[Customer Service](#)

Now just fill out the form (see #2) and press the submit button (see #3).

Report an Issue

Report an Issue

Report an issue

*** Select Account / Child Account (if applicable)**

TEST ACCOUNT

x

v

*** Is the issue impacting all locations?**

-- None --

*** What Service is impacted?**

-- None --

☐ Additional Services Impacted

*** Which one of these best describe the type of issue you are experiencing?**

-- None --

*** Is the issue intermittent?**

-- None --

*** Problem description or comment**

☐ Urgent Issue

Add attachments

3

Submit

Required information

Is the issue impacting all locations?

What Service is impacted?

Which one of these best describe the type ...

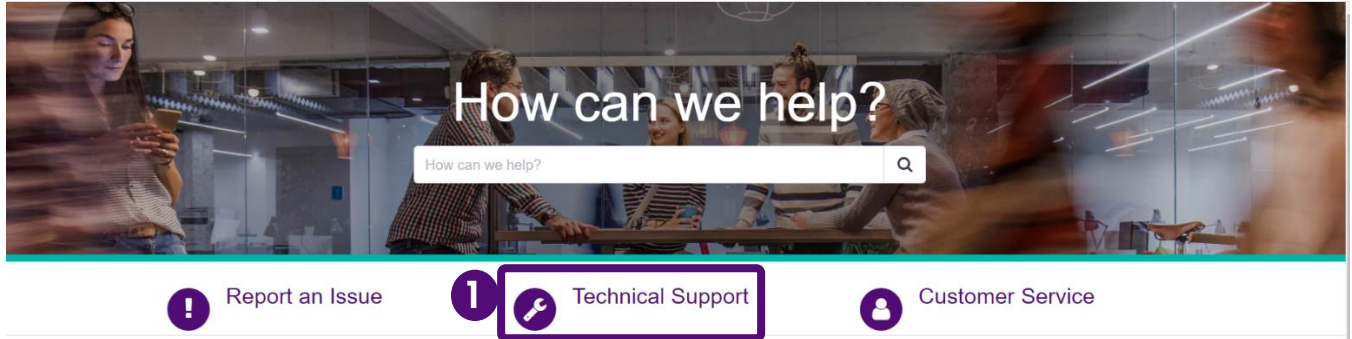
2

Question	Description
Select account/ child account (if applicable)	Select the account impacted by the issue.
Is the issue impacting all locations?	If you answer “No” to this question, you will need to select the locations impacted by the issue.
What service is impacted?	Select the main service impacted by the issue.
Additional services impacted	If you have more than one service impacted, please check this box and select all the impacted services.
Which one of these best describes the type of issue you are experiencing?	Select the answer that best matches your issue.
Is the issue intermittent?	The issue is intermittent when sometimes the service works and sometimes it does not.
Problem description or comment	Please add as much information as you can. That will help us understand the issue you are facing. You can use the “Add attachment” button at the bottom of the form to complete your description.
Urgent issue	Check this box only if this issue has a huge impact on your activities or impacts a lot of users. This question helps us prioritize your request, you will be prompted to provide detail on the request.

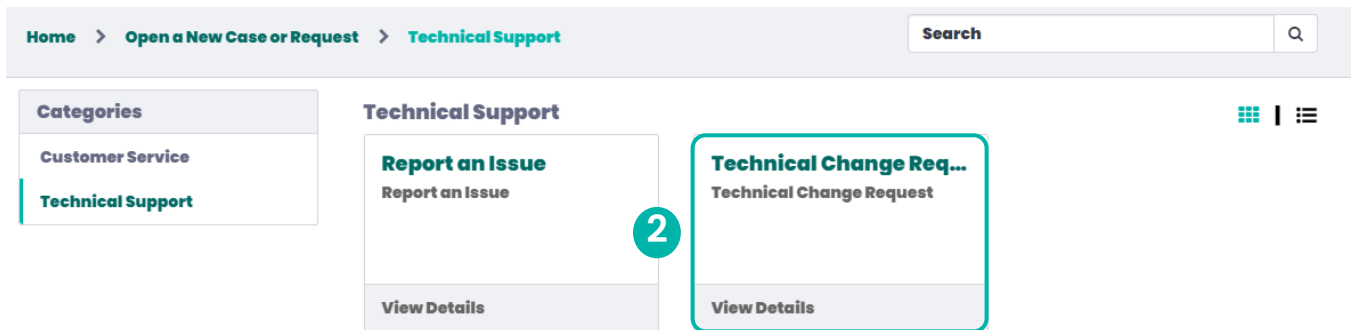
b. How to Open a Technical Change Request

If you need a technical configuration change to your voice or data service, you can open a technical change request.

In the homepage, click on “Technical Support” shortcut (see #1)

[MY CASES & REQUESTS](#)[PRODUCTS](#)[CONTACTS](#)[CUSTOMER EXAMPLE](#)

You will then see all the items available for the technical support category. Click on the “Technical support” item (see#2).



Now just fill out the form (see #3) and press the submit button (see #4).

Technical Change Request

Technical Change Request

Request a technical configuration change to your voice or data service here.

3

* Select Account / Child Account (if applicable)

TEST ACCOUNT

* Which from the list here, would you like to apply a technical change to?

911 service

* Which one of these best describe the type of issue you are experiencing?

-- None --

Add attachments

4

Submit

Required information

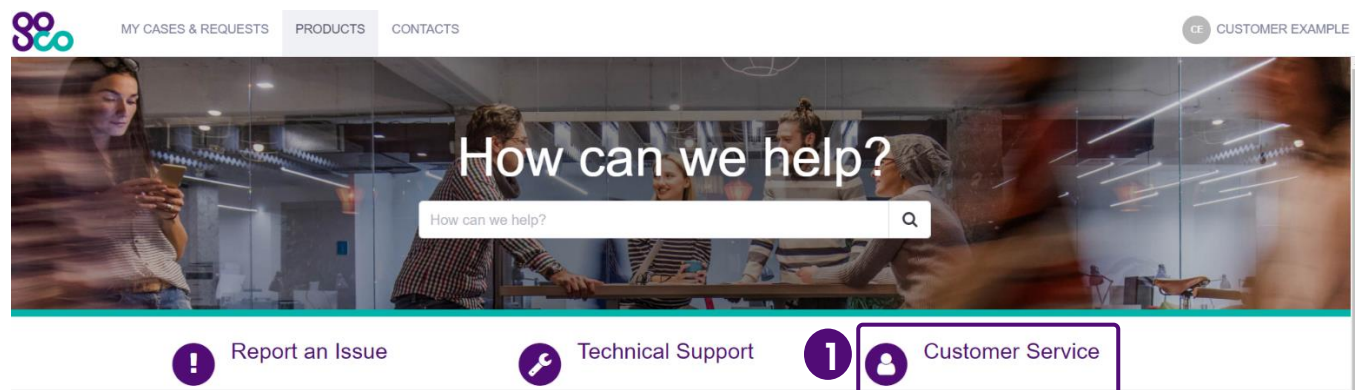
Which one of these best describe the type of i...

Question	Description
Select account/ child account (if applicable)	Select the account impacted by the issue.
Which from the list here, would you like to apply a technical change to?	Select the service on which you want to make a change request.
Which one of these best describe the type of issue you are experiencing?	Select the answer that best matches your issue.

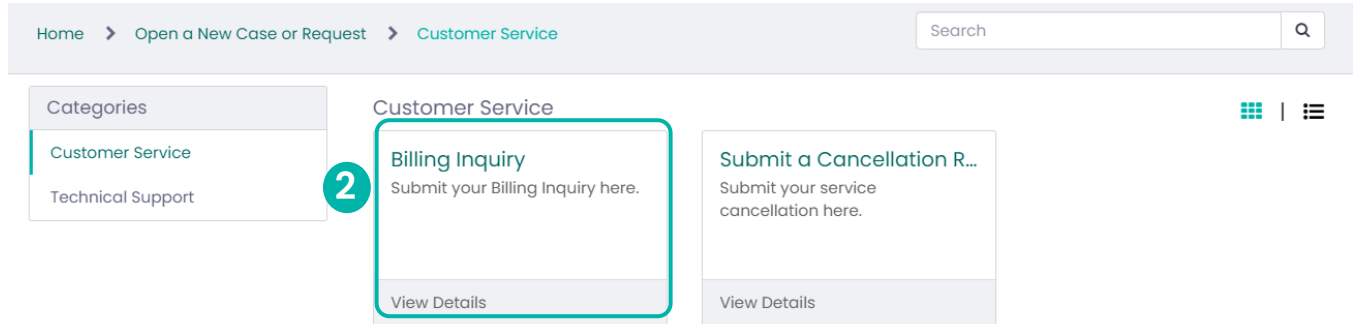
c. How to Open a Billing Inquiry

If you need a billing or payment inquiry, you can use the billing inquiry item.

In the homepage, click on “Customer Service” shortcut (see #1)



You will then see all the items available for the customer service category. Click on the “Billing Inquiry” item (see#2).



Now just fill out the form (see #3) and press the submit button (see #4).

Billing Inquiry
Submit your Billing Inquiry here.

Submit any Billing and Payment Inquiries

3

***Select Account / Child Account (if applicable)**

TEST ACCOUNT

***What is your billing inquiry related to?**

-- None --

***How would you like us to contact you?**

-- None --

***Describe request**

Add attachments

4

Submit

Required information

- What is your billing inquiry related to?
- How would you like us to contact you?
- Describe request

Question	Description
Select account/ child account (if applicable)	Select the account impacted by the issue.
What is your billing inquiry related to?	Select the answer from the choice list that best matches your request type.
How would you like us to contact you?	We can contact you by email or phone in order to answer your inquiry. We will then use your information present in your profile. To change your contact information, go to the section 3.a, Profile Setting.
Describe request	Add any information that can help us understand your request.