

How to Open a Ticket

v 1.1



How to Open a Ticket

STEP 1

Login to Portal.exigo.com using the same credentials as exigo.com.

STEP 2

Click on "Tickets".

A Dashboard		Open T	Tickets					
S Tickets		+ Creat	h Tokat View			Ticket ID	\$ Search	٩
All Tickets	22	Ticket ID	Subject -	Status	Priority	Category	Туре 🗣	Last Activity
New Submission	3	92296	Order Calc- Spin up Instance	Work Completed-Resolv	Low	Order Calc	Change Request	8/17/2017
Under Review		92297	Implementation Management	Work in Progress	Low	Country Launch	Change Request	11/8/2017
Assigned to Resource	2	92315	COMMISSION: Comp Plan- Crescendo	Pending Client Info	Low	Commissions	Change Request	11/8/2017
Work in Progress	3	92316	MONEY IN: Payment Authorization Form-Crescendo	Info Updated by Client	High	Money In	Change Request	10/23/2017
To Be Scheduled		92317	WEB: Intake and Requirements-Crescendo	New Submission	Low	Web	Change Request	10/11/2017
Pending Client Info	6	92321	MONEY IN: Merchant Credentials-Crescendo	Assigned to Resource	Low	Money In	Change Request	10/4/2017
Pending Third Party		92323	MONEY OUT: Requirements Crescendo	Pending Client Info	Low	Money Out	Change Request	10/3/2017

STEP 3

Click on "+ Create Ticket".

STEP 4

Complete fields highlighted in yellow. Explanation of fields below.

ket Info 🗍 🗎 /	Attachments		
Your Name	Your name	Туре	(select type)
Your Email(s)	(separated by commas)	Reference Ticket	
Your Phone(s)	(separated by commas)	Pre-aprove access level	None
Subject	Your subject		
B I Ŧ	<u>U</u> = = = = = = = = [], co, -		



- 1. Your Name: Enter the Name to Contact for this ticket.
- 2. Your Email: Enter the email address(s) that will be used for communication about this ticket. For communication to go to multiple recipients, separate each email address by using a comma ",".
- 3. Your Phone: Enter the phone number(s) where you may be reached to discuss this ticket. For multiple phone numbers, separate each phone number by using a comma ",".
- 4. Type: If your system is down, choose "Service Interruption" from the drop-down list. If your system is not down, choose "Change Request" from the drop-down list.
- 5. Reference Ticket: Optional field. If the issue is related to another ticket, enter the ticket number (i.e. 95789).
- 6. Subject: Enter a few key words to describe the reason for the ticket (i.e. Issues with Enrollment)
- 7. Ticket Body: Enter the details of the issue. Please list specific examples of the issue including Customer ID, Order ID, or Item ID depending on the reason for the ticket. More information allows faster action.
- 8. ***Attach screenshots, word documents with screenshots, pictures from your phone, etc., to show where the issue is located.

STEP 5

Click "Create Ticket".

If you experience issues opening a ticket, please contact our 24 hour Support Number at 214-367-9999.